

California Forum 2009

Letting Collaboration Happen

July 17th and 18th, 2009

The Southern California Institute is very excited and proud to announce that we, along with the Financial Planning Association, and The Advisors Forum, will be collaborating together in order to bring the **California Forum – Letting Collaboration Happen** program here to San Diego on July 17th and 18th, 2009. As you know, during these confusing and difficult times it is even more important that we gather together to share insights, education and collegiality.

This program is designed to help attorneys, accountants, bankers, financial advisors, etc. build client teams that provide optimum service with atypical strategies and solutions for their clients. The processes and solutions we teach in this fast-paced two day program will demonstrate how to attract more opportunities and close more business.

Day 1: Learn what a wealth planner needs to know about asset protection, business, and estate planning strategies for today's new environment.

Day 2: Work with fellow advisors of all disciplines to learn language and tools that will help you attract new clients, engage current clients; re-approach prospective clients; and increase collaborative opportunities.

Speakers:

Alex Matuk, Esq. and Laura Stees, CPA
Lori Adasiewicz, Esq. and Stan Miller, Esq.
Carol Gonnella, Esq., and Cecil Smith, Esq.
Danny Wexler, Esq., Vito Lanuti, Esq., and Brad Davidson
Mark Merenda, Hillel Katzeff, CFP, Stephen Mancini, Esq.
Scott Stewart, Esq. and Diedre Wachbricht Braverman, Esq.

Moderators:

Joseph Strazzeri, Esq. and Hillel Katzeff, CFP

Dates:

Friday, July 17 & Saturday, July 18, 2009
Friday: 8:30a.m. – 5:15p.m.
Saturday: 8:00a.m. – 5:00p.m.

Participant Fee:

Both Days: \$220.00

Program Location and Accommodations:

Hyatt Regency La Jolla
3777 La Jolla Village Drive
San Diego, CA 92122

Phone: 858-552-1234

Toll Free: 800-233-1234

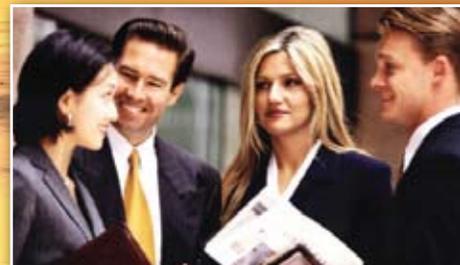
Southern California Room Rate: \$199 for single or double

Room Rate Cut Off Date: July 2, 2009

Please RSVP: (858)200-1911 or email events@scinstitute.org.

For Further Information:

For more information about The CA Forum or additional programs offered by the Southern California Institute, please contact **Shelley Lightfoot** at (858)200-1911 ext. 117 or visit our website at www.scinstitute.org.



Also Note: Save the Date for The Laureate Gathering, February 25th - 27th, 2010 in San Diego

California Forum 2009

SCHEDULE OF EVENTS

DAY ONE

Friday, July 17, 2009

8:30 - 9:45 **Protecting What We Have in these Economic Times**
Carol Gonnella, Esq. and Cecil Smith, Esq.
Our clients are now coming to us not only to satisfy their estate planning goals, but seeking ways to protect their assets without fear of seizure. We will explore LLCs and other tiers of asset protection to determine how they can be used not only for creditor protection, but as an integral part of many estate plans for transfer of assets to younger generations by way of gift, sale, or bequest in a leveraged manner.

9:45 -11:00 **Understanding Business Owner Taxation**
Alex Matuk, Esq. and Laura Stees, CPA
Many of our business owner clients find themselves in a changed and changing set of rules for taxation. They tell us it isn't what you make - but what you keep. Learn the questions to ask as well as how to understand and explain the options business owners have. Explore the business entity level as well as your client's own personal taxation issues and opportunities.

11:00-11:30 **Break**

11:30-1:00 **Sponsored Lunch; Southern California Institute, Wealth Counsel, Advisors Forum, and You**
Understand opportunities to find unique ways to help your business survive, grow, and thrive in today's market.

1:00-2:15 **Business Valuations Help Uncover New Opportunities**
Danny Wexler, Esq., Vito Lanuti, Esq., and Brad Davidson
Business owners tend to misjudge what their companies are worth. Advisors and business owners should be aware of warning signs and proactively raise the valuation issue to uncover potential landmines. Learn how to work with appraisers to educate the owner and use the process to insure your solutions are accepted and implemented - and how to understand/utilize these valuation documents.

2:15-2:45 **Break**

2:45-4:00 **Who Should be the Beneficiary of Your IRA?**
Carol Gonnella, Esq. and Cecil Smith, Esq.
This question is one of the more complicated decisions in our estate planning process. The rules are convoluted and working through the maze of options is difficult even for the advisor. Cecil and Carol will discuss the options available for our clients in a logical progression that you can then take back to your office and implement in your everyday practice.

4:00-5:15 **The Intersection of Elder Law and Estate Planning**
Scott Stewart, Esq. and Diedre Wachbricht Braverman, Esq.
Learn how to spot critical long-term care issues and how to implement solutions into your planning strategies. Avoid common mistakes and pitfalls about Medi-Cal eligibility such as ignoring important Government Programs/Benefits or thinking it's too late to plan. Help your clients develop comprehensive solutions that will allow them peace of mind for their future physical and financial health.

DAY TWO

Saturday, July 18, 2009

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FINANCIAL PLANNING ASSOCIATION
OF SAN DIEGO
The Heart of Financial Planning™

Letting
Collaboration
Happen

8:00 -8:30 **What Doesn't Work – Or does it?**
Collaboration between disciplines for the benefit of clients is often talked about but seldom followed through in a way by which the client is helped and enjoys the experience. Brainstorm with us about what doesn't work, why it doesn't, and how it might.

8:30 -9:15 **The “_____” Practice Experience**
Each of our businesses has a process or “experience” to attract, engage, and work with our perfect clients. This review and individual exercise helps us each better understand and refine our own client experience through the eyes of our referral advisors and team. Drive insights and actions that you can implement with your team, into your own business, next week.

9:15-9:45 **Break**

9:45-11:00 **Creating and Coordinating Referrals**
Why is it that some referral sources introduce clients that are excited about your advice and become your perfect client; while other referral sources seem to produce inquisitive potential clients that are at best luke warm? Through facilitation, in inter-disciplinary groups of 3, review processes that have proven results and create your own process to implement with your referral sources and team.

11:00-12:15 **Inter-disciplinary Collaborative Wealth Meetings – Create great plans and “Buy-In”**
When meeting as a collaborative team (with or without the client present), do we create an inspiring environment for the benefit of the other advisors and client? In our groups of 3 we will review two uniquely different approaches (the Analyze and Test Meeting AND the “Little Blue Box” meeting) in order to develop your own method to understand the purpose, expectation, data, process, and meeting action checklists of the collaborative team plan design meeting.

12:15-12:30 **Break**

12:30-2:00 **Working Lunch – Case Studies**
As table groups of nine, review the personal facts, data, and goals of the “prospective client.” Utilize the tools from the morning to analyze, test, and challenge combinations of planning theories and strategies to design the client's plan as an inter-disciplinary team.

2:00-2:30 **Creating the Wealth Plan**
Document your group design plan on overhead transparencies.

2:30-2:45 **Break**

2:45-4:00 **Design Strategies**
Review of different plan designs and the process of getting there. Learn from others and your own group to be able to hone your skill to create advocates from snipers and client buy-in through understanding.

4:00-5:00 **Takeaways**
Taking it back to your own business can be the largest challenge in benefiting from a program like today. Understand from others and create your own action list for your team and business to implement. Attract, engage, and implement with your perfect clients in today's market.