



California Forum 2013

Working with Successful Families and Business Owners



The Southern California Institute is very excited and proud to present the **California Forum 2013 – Working with Successful Families and Business Owners** on August 23, 2013. 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 accountants, attorneys, bankers, life professionals, financial advisors, and other wealth advisors build teams that provide optimum service with atypical strategies and solutions for their clients. The processes and solutions we teach in this fast-paced program will demonstrate how to attract more opportunities and close more business.

Program Moderators:

Joseph Strazzeri, Esq. and Stephen Mancini, Esq.

Program Date and Time:

Friday, August 23rd

8:00am - 8:45am Breakfast & Registration

8:45am - 5:00pm General Sessions

5:00pm - 6:30pm Reception

Program Cost:

\$100.00

****All Net Proceeds will be donated to Sharp HealthCare Foundation****

Venue:

Sharp HealthCare Foundation

8520 Tech Way

San Diego, CA 92123

858-499-4200

Rooms available at:

Courtyard Marriott

8651 Spectrum Center Blvd

San Diego, CA 92123

858-573-0700

Continuing Education Credits:

8 hours MCLE Approved Provider #11857

8 hours CPA

CFP and CA Insurance Credits, pending approval

To Register:

Register online at www.scinstitute.org or contact

Mike Armstrong at mpa@scinstitute.org

or 858 200-1911



This year's California Forum is being held at, and will benefit, Sharp HealthCare Foundation

For more information about our various programs, please go to www.scinstitute.org or contact:
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California Forum 2013

Working with Successful Families and Business Owners

AGENDA

Friday, August 23

8:00am - 8:45am - Registration & Breakfast

8:45am - 9:00am - Opening Remarks

9:00am - 9:45am - Business Owners with More Than 50 Employees – Concerned About 2014; Presented by Sharp HealthCare Executive Leadership Team - With margins for these business owners having been so tight over the past few years, the increased cost of health care for their employees may cause many businesses to go into the red. Join the leadership team as they reveal the truths behind health care reform and how it affects the business owner that is your client. Come away with the language and tools to help your client see into the future, understand the real risks, and plan for the contingencies.

9:45am - 10:30am - The Elusive \$15MM - \$75MM Entrepreneurial Family: What You & They Should Know; Presented by Carl Sheeler, PHD, CBA, AVA, and Joe Strazzeri, Esq., - Between the >\$10MM wealthy and the incredibly UHNW Family Office of \$300MM+ lies the oft misunderstood and under-appreciated family business founder, family, and staff who have concentrated risk and have prevailed against the onslaught of business, personal, and advisory challenges. What do they think, want, and need? Why do they heed some advice and not others? How does an advisor differentiate him/herself with true "value-add" services and enjoy high client retention and amazingly higher fees year-after-year? Hint: It isn't firm size that matters and transactional mindsets seldom work.

10:30am - 10:45am – Break

10:45am - 11:30am - And the Winner Is . . . Nevada?; Presented by Jeffrey Dunham and Jeffrey Burr, Esq. - Nevada is a top tier jurisdiction when it comes to asset protection and trust planning . . . WHY IS THIS? This presentation will address key advantages of Nevada jurisdiction and laws, including asset protection strategies, tax environment, and dynastic planning. Attorneys, financial advisors, CPAs, and other key client advisors will learn how to help clients reach their planning goals while growing their own practices and profitability.

11:30am - 12:45pm - Lunch Presentation - Philanthropic Planning in SD with Sharp HealthCare; Presented by Bill Littlejohn, CEO, Sharp HealthCare Foundation - During the last decade the Foundations of Sharp HealthCare, through helping advisors and their clients, have generated more than \$160 million in philanthropy. For many years, Sharp has been the beneficiary of not only generous planned gifts from individuals and families, but also of the support, engagement, and advice of gift and estate planning professionals; notably through the Sharp Family of Advisors and its series of small group forums. Learn how to be part of the Sharp Family of Advisors, help your clients, and stay informed in the ever changing health care landscape.

12:45pm - 1:30pm - Changing the Dialogue; Presented by Trey Fairman, JD, LL.M and Steve Mancini, Esq. - Collaboration – often talked about, seldom done well, and mostly boring. Join Trey and Steve in an interactive dialogue as they review how to change the client/advisor conversation; reinforce yourself as a consultant instead of just another sales person; and bring various parties together focusing on clients' priorities. Increase the probability of a client engagement through financial/legal strategies as well as choosing from client advising, engagement, or partnering practice models.

1:30pm - 2:15pm – In the Brave New World of FATCA & Co: Is Offshore Planning Dead?; Presented by Max Riederer von Paar, Esq. and Alex Matuk, Esq. - Many planners may finally give up on the idea of planning with offshore entities in the time of FATCA and transparency. However, offshore planning is alive and well. Offshore entities can help with asset protection planning, tax planning for inbound investments, pre-immigration planning, diversification of assets, and international estate planning. Max and Alex will discuss the ins and outs of offshore planning in today's world (as well as the related due diligence and reporting requirements) to allow wealth planning advisors to identify possible pitfalls and to make educated decisions.

2:15pm - 2:30pm - Break

2:30pm - 3:15pm - Shifting Focus to Grow Your Business; Presented by Greg Banner, CLU®, CFP®, CRTP and Peter Sieffert, Business Consultant - Everyone talks about working on your business rather than working in your business but few actually get it done. Peter and Greg will present to you a simple proven tool and unique methodology to create a framework and step-by-step plan to better manage your business and help your business clients do the same.

3:15pm - 4:00pm - The 5 Most Common Wealth Destroying Mistakes Business Owners Make at the Company Level and How to Fix Them; Presented by Mike Rodman, CFP® - Business owners are overwhelmed with trying to increase their revenues and reduce expenses due to the challenging economy. It is virtually impossible for them to focus on the daily business challenges and maximize the wealth planning opportunities that are available within the company. Learn the 5 most common personal wealth destroying mistakes business owners are making everyday at the company level and how you can introduce a process to deliver the solutions that they need to implement now.

4:00pm - 4:45pm - What Now?; Presented by John Jenkins, CEO - Traditionally, people, especially professionals, have limited any discussion of wealth to financial assets: investments, real estate, cash, and worldly possessions. But when asked what we value most in life the majority of people say: family, health, friends, values, skills, and relationships. We might even add our accumulated wisdom, education, life lessons, and our experiences in the school of hard knocks. Furthermore, when asked what the biggest investment we ever made in our lives was, people typically respond with the time, energy, love, and commitment they made in building their family. "What Matters" will introduce you to a more holistic view of Family Wealth. This discovery will change everything you've ever thought about estate planning.

4:45pm - 5:00pm - Wrap up

5:00pm - 6:30pm - Reception