



California Forum Fall 2015

Practicing Collaboration in Today's "Technical" World

October 1st, 2015

Bring your referral partners! Learn about the current climate for technical client topics and strategies in the morning and then understand your marketplace and how to collaborate in the afternoon!

The Southern California Institute's semi-annual California Forum is partnering with the Society of Financial Service Professionals and America's Top Planner to provide wealth advisors with the tools and resources to take care of and protect client families.

Accountants, insurance professionals, financial advisors, bankers, attorneys, and other wealth professionals must build teams that can provide optimum service and atypical strategies and solutions for their clients.

This program will focus on what's old, what's new, what's working, and what's not in insurance, AUM, legal, and tax strategies.

Explore how to attract and engage these clients through an understanding and appreciation of their needs and perspectives.

Moderator: Joe Strazzeri, Esq.

Date and Times: Thursday, October 1, 2015

8:00am – 8:30am

8:30am – 5:00pm

5:00pm – 6:30pm

Registration and Breakfast

General Sessions

Hosted Cocktail Reception

Co-Sponsored by:

Location:

Morgan Run Club and Resort

Main Ballroom

5690 Cancha De Golf

Rancho Santa Fe, CA 92091



Program Fee:

SFSP member – no cost

Non-member - \$85



Continuing Education:

CFP & CA Insurance credits - applied for

CPA & MCLE (approved provider #11857) – credits offered

To Attend:

Register on-line at www.scinstitute.org or contact Mike at 858-200-1911, mpa@scinstitute.org.

8:00 – 8:30 Registration and Breakfast

8:30 – 9:20 Asset Protection - Locations, Structures, and Asset Classes

presented by Jeff Burr, Esq. and Steve Mancini, Esq.

So, is asset protection a primary concern for today's clients - or is it just hype - or is it misunderstood? Join Jeff and Steve as they demystify understanding how to identify the appropriate clients, assets, and jurisdictions that keep the current advisors involved and more *simply* protect a client's family and their assets. Review the four categories of choices in today's onshore and offshore world.

9:20 – 10:10 Captive Insurance Company Assessments - An Advisor's Tool

presented by Matthew Iamelli, ACI and Joe Strazzeri, Esq.

With the large number of captive insurance companies currently established, how does an advisor attract, engage, and work with that business owner? The Captive Assessment offers the business owner and advisor a tool to better understand if the structure was established and subsequently managed correctly; associated and current risks; as well as possible adjustments to prior returns, business decisions, and asset reallocation. Congressional proposals for doubling contributions to captive insurance companies and best practices for the establishment of new captives will also be reviewed.

10:10 – 10:30 Coffee and Networking Break

10:30 – 11:20 Estate Planning and Planned Giving - The Chicken and the Egg

presented by Norm Timmins, JD, Major Gift and Estate Planning Director, Sharp Foundation and Alex Matuk, Esq.

Some of us practitioners remember when Crescendo was only owned by the charities. Back then, Charitable/Planned Giving Officers were often included early on by the estate planner. Philanthropy was not only used as a way to attract and engage high net worth families but also as a way to discover family hopes, dreams and desires that could possibly drive the planning process. Join Norm and Alex as they reveal how this back-to-the-future planning matches today's client needs. As practitioners, choose and engage your passion, charity, and clients well.

11:20 – 12:10 Reinventing the ILIT's Purpose To Meet Your Client's Planning Goals

presented by Ann Rosevear, JD, President, Chief Trust Officer and David Ruyle, Esq.

Estate tax planning - the primary purpose of many irrevocable life insurance trusts - may now be irrelevant in the light of The American Taxpayer Relief Act of 2012. What goals will your clients' ILITs now achieve - wealth transfer, estate liquidity, dynastic family giving? Are policy values being maximized for beneficiaries? This session explores various planning, evaluation, and exit strategies that will serve as conversation starts for your ILIT clients.

**12:10 – 1:20 Lunch and Sponsor Presentation
Partnering with California Estate and Elder Law**

presented by Scott Stewart, Esq. and Kim Vawter, Esq.

Learn how bringing in experts in Estate Settlement and Elder Law can help your clients over 60 and your practice - retain and gain more AUM, sell more life insurance and LTC, and increase compensation. Understand how to best structure assets, attract new clients through generations, become a valued resource during difficult times, and facilitate collaboration with your perfect client family.

1:20 – 3:00 The Brave New Wealth Planning World - Adapt, Move, or Die

presented by Joe Strazzeri, Esq. and Steve Mancini, Esq.

How do we continue to attract, engage, and work with our favorite clients and their advisors when the wealth planning industry is about to be "Ubered" ...hard! Providing legal and financial strategies/solutions, counseling, and required personal service in a way that automated tools cannot yet duplicate is the wave of the future (sound familiar?). Join Joe and Steve as they share their research and insights as to what they - and others - think we need to do to stay relevant.

3:00 – 3:30 Networking and Exhibitor Break

3:30 – 4:50 Building Collaborative Teams - How the Rubber Meets the Road

presented by Shelley Lightfoot, Executive Director and Greg Banner, CLU®, CFP®, CRTP

Successfully attracting and helping affluent families in today's market often requires a multi-disciplinary approach. However, developing a successful team is more challenging than it sounds. In this interactive discussion, Shelley and Greg will help you consider how to resolve various challenges such as effective introductions, choosing compensation, sharing revenue/costs, remaining independent, competing with institutions, offering varied services, choosing a process, and developing a shared message. Utilize this session to understand and decide which types of advisors should be on your team. Discover what really makes collaboration effective and learn the three key common concepts for all successful multi-disciplinary teams.

4:50 – 5:00 Wrap up and Taking it Home

5:00 – 6:30 Hosted Cocktail Reception

For information about other SCI or SFSP programs and events, please go to www.scinstitute.org or <http://www.financialpro.org/sandiego> respectively, or contact:



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