The FPA National Capital Area Presents:

The 2012 Winter Educational Symposium

Wealth Management for Affluent Seniors

Sophisticated strategies for financial professionals to help address the complex legal, financial, housing and health needs of affluent clients as they age.

Friday, January 27, 2012

2300 Dulles Corner Boulevard • Herndon, Va.

703-713-1234 • www.dulles.hyatt.com

Ten Minutes from Beltway
Easy Access from Dulles Toll Road
Complimentary Parking

"This annual meeting is a must for me and our firm. It is hard to get this much high level information and CEU's at any other local financial meeting!"

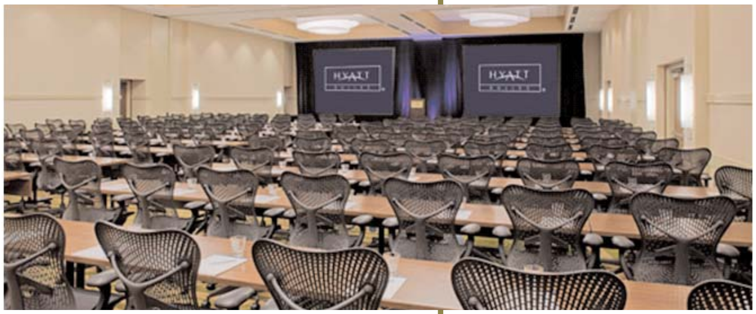
- Alex Armstrong, CFP®,
Armstrong, Fleming and Moore

FPA NCA
FINANCIAL PLANNING ASSOCIATION
NATIONAL CAPITAL AREA

The Heart of Financial Planning
Learn, Grow, Flourish, Contribute

Make the most of attending:

- Engage in hot senior topics, including vulnerabilities of affluent widows and widowers
- Earn up to 8 CEU's (CFP®, VA/MD insurance and CPA) and 2 CFP® Ethic CEU's (all filings pending)
- Connect with industry thought leaders, leading geriatrics researchers and corporate partners
- Network with like-minded professionals, potential partners, employers and job candidates
- Experience a new state-of-the-art conference center, featuring wireless access throughout
- Receive an updated Financial Professional's Guide to Working With Older Clients, AARP and the Financial Planning Association® (FPA®)



"It's the one annual FPA event I don't miss!"

- Barry Glassman, CFP®, CFC, Glassman Wealth Services, LLC

Earn continuing education credits!

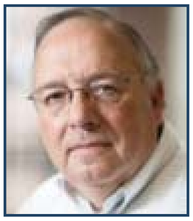
8 CFP CEU
8 VA INS
8 MD INS
PLUS 2 Optional Ethics CFP CEU

Pending Approval

Event Schedule - Friday, January 27, 2012 ***See below for schedule, speakers, info & topics.***

6:30 AM – 6:45 AM
Ethics Check-in

8:15 AM – 8:45 AM
General Check-in



6:45 AM – 8:30 AM
Winning Ethics, Dan Candura, Candura Group, LLC
Ethics training doesn't have to be dull and boring.

8:45 AM - 9:00 AM
Opening Remarks, Christine Parker, CFP®, Parker Financial, LLC, chair of the 2012 Winter Educational Symposium



9:00 AM – 9:50 AM

Whom Can We Trust? Panelists: Karen Roberto, Ph.D., Director of the Center for Gerontology, Institute for Society, Culture and Environment, Virginia Tech; Shelly L. Jackson, Ph.D. Assistant Professor of Psychiatry and Neurobehavioral Sciences Institute of Law, Psychiatry and Public Policy, University of Virginia; and Don Blandin, President, Investor Protection Trust. Moderator, Christine Parker, CFP®, President, Parker Financial, LLC. Following the session, participants will be able to recognize the warning signs of elder financial abuse and have a greater awareness about the growing epidemic problem and identify the seven red flags that indicate the inability of a client to make important financial decisions.

9:50 AM – 10:40 AM

Estate and Tax Planning for Wealthy Widows and Widowers, Beth Shapiro Kaufman, JD, Partner, Caplin & Drysdale

Following the session, participants will be able to utilize effective estate planning and tax planning strategies for wealthy widows and widowers.

10:40 AM – 10:50 PM

Networking Break with Corporate Partners

10:50 PM – 11:40 PM

Engineered Income Portfolios, Brent Burns, Asset Dedication, LLC

Following the session, participants will be able to critically evaluate an innovative and practical portfolio strategy that is engineered to provide dependable income during volatile or uncertain markets.

11:40 PM - 12:30 PM

2012 Election: Why Affluent Seniors and Their Advisors Should Care, Keynote Speaker Gregory R. Valliere, Chief Political Strategist, Potomac Research Group

Following the session, participants will be able to handicap the potential impact of 2012 elections on domestic, foreign and economic policies that are most important to the 'Silent Generation,' born during the great Depression and WWII.

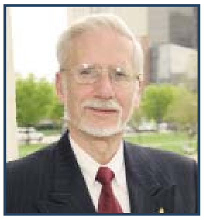
12:30 PM – 1:40 PM

Networking Lunch

1:40 PM – 2:30 PM

Social Security Strategies, William (Bill) Meyer, Founder and CEO of Retiree Inc and Social Security Solutions, Inc.

Following this session, participants will understand the basic rules surrounding SS retirement benefits including – eligibility and entitlement; Full Retirement Age; Discounting and Delayed Retirement Credits, how to compare strategies – cumulative benefits and time value of money and ideas on how to integrate SS into an advisor's practice – implications for financial planning projections and investment management.



2:30 PM – 3:20 PM

Index Annuities: Looking Under the Hood, John L. Olsen, CLU, ChFC, AEP, Olsen Financial Group, co-author with Michael E. Kitces, MSFS, CFP®, CLU, ChFC, The Annuity Advisor

Following the session, attendees will undestand the basics of how index annuities work, how interest credited to an index annuity is LINKED TO, but not EQUAL TO, the growth of an equity index, the "moving parts" that limit such interest crediting, and why some "conventional wisdom" about annuities is not wisdom, but misunderstanding.

3:20 PM – 3:30 PM

Networking Break with Corporate Partners

3:30 PM – 4:20 PM

Senior Residence Issues: Roles and Resources for Planners, Melissa Beck, Vice President, Field Operations, LivHome

Following this session, participants will be become skilled at identifying elderly housing resources that can best meet the life-style needs of affluent seniors.

4:20 PM – 5:10 PM

Prepare for Dementia: Efficiently Help Clients with Diminished Capacity, Steven Starnes, MBA, CFP®, Financial Planner, The Monitor Group, Inc.

Following this session, participants will be able to draft a written policy for how your firm will work with clients with dementia that may help you avoid ethical and legal dilemmas.

5:10 PM – 5:20 PM

Closing Remarks, Rita Cheng, CRPC®, CFP®, Ameriprise Financial Services, president of the 2012 FPA NCA

5:30 PM – 6:30 PM

Networking Reception – Cash Bar

"Affluent older clients need peace of mind that you can help them overcome the challenges of managing and distributing wealth as they age – this symposium will focus on how to provide competent care."

- Christine Parker, CFP®, chair of the 2012 Winter Educational Symposium

Register now and SAVE $100!

Visit www.fpanca.org

Pre-Registration Required. Seating is Limited -- We will sell out so don't delay!

Payment must be received in order to confirm registration

- Please Arrive EARLY so that the program may begin promptly!
- Registration Begins at 6:30 a.m. for the Ethics Course
- Registration for the main program begins at 8:15 a.m.

Refund Policy: Cancellations prior to January 7, 2012 which require a refund will incur a $100.00 processing fee. No Refunds Made after January 7, 2012. Substitutions will be accepted.

Mail check and Registration Form to:

FPA National Capital Area
c/o Peggy Nelson
12816 Tewksbury Drive
Herndon, VA 20171

Registration Information

Please register on line for this program at www.fpanca.org or complete this information and return this entire form with your check.

Before December 15, 2011 – Members $250 – Non-Members $300 – Non-Profit Assoc. Staff $250
Before January 7, 2012 – Members $300 – Non-Members $350 – Non-Profit Assoc. Staff $300
After January 7, 2012 – Members $350 – Non-Members $400 – Non-Profit Assoc. Staff $350

NAME:__________ DESIGNATION: __________

FIRST NAME FOR NAME BADGE: __________

COMPANY: __________

ADDRESS: __________

CITY: __________ STATE: _____ ZIP: __________

PHONE: __________ FAX: __________

E-Mail: __________ Amount Paid: __________

Are you Registering for the Optional Ethics Course? ❒ YES ❒ NO

FPA NCA Members: Ethics Course at No Charge
Non-Members: Ethics Course $50 (Please send payment at time of registration if required.)

Cocktail Party: ❒ I WILL ATTEND ❒ Sorry, I CANNOT ATTEND

CREDITS: Credits will be awarded in BLOCKS, for the Ethics Course, the Morning session and the Afternoon session. You MUST BE PRESENT for the ENTIRE BLOCK to receive any credits for that portion of time.

Indicate Preference: Meat: __________ Vegetarian: __________

SS# for Credits: __________ MD Lic# __________ VA Lic# __________

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