

FPA CHAPTER MEETING - TUESDAY, APRIL 20, 2010!

Time: 5:30 - 6:00 PM—Registration and Networking ♦ 6:00 - 8:00 PM—Dinner & Presentations

Location: Hurricane 100 Room, UM's BankUnited Center, 1245 Dauer Drive, Coral Gables

Cost: *In Advance:* Members: \$45; Non-Members: \$55 / *At the Door:* Members: \$55; Non-Members: \$70

\$3 TRILLION IN NEGLECTED WEALTH – HOW TO GET YOUR SHARE

Presented by Dave Moran, CFP®, CLU, ChFC

Valued at more than \$3 trillion, life insurance cash value is a huge component of wealth that has been largely neglected. Policy holdings are in desperate need of professional management. With a market that is larger than hedge funds, separately managed accounts and exchange traded funds combined, life insurance portfolio management is the biggest untapped wealth management opportunity our industry has seen in 30 years. Dave Moran shares a portfolio management process you can immediately put to use to grab your share of this neglected wealth.

HELPING CLIENTS AGE GRACEFULLY: NAVIGATING THE ELDER CARE MAZE

Presented by Rona Bartelstone, LCSW, BCD, CMC, C-ASWCM; Alex Cuello, JD, LL.M.;
William R. Dyess, CLTC; and Dolores Perdomo, Ph.D., LCSW

Improvements in longevity present financial planners with a multitude of complex issues when assisting clients and their aging parents in making the increasingly complex decisions they face. A distinguished panel of local experts in their fields will focus on today's elder care issues. This interactive program will explore: elder law planning; how to recognize when a client's mental condition may be starting to fade; the latest on long term care insurance; and how to advise your clients about the resources available to help them make informed decisions. Join us for this opportunity to discuss these timely issues, and network with other industry professionals.

CE CREDITS PENDING

To register, please forward payment by credit card or check by 5:00 PM, Friday, April 16, 2010

Fax form below with credit card information to: 305-470-7487

OR

Mail form below with check to: FPA of Miami-Dade, P.O. Box 560982, Miami, FL 33256-0982

Payment must be received prior to meeting or guaranteed with a credit card.

Cancellations received 48 hours prior to the meeting will receive a full refund. "No-shows" will be invoiced.

Please charge my MasterCard Visa Amex or I will send a check (must be received by 4/16/10)

Credit Card # _____ Exp. Date _____ Amount _____ (Members: \$45; Non-Members: \$55)

Name _____

Company _____

Company Address, City, State, Zip _____

Credit Card Billing Address, City, State, Zip (if different from above) _____

Phone _____ Fax _____

CFP Board ID # _____ Member _____ Non-Member _____

E-mail _____

By my signature below, I hereby authorize FPA of Miami-Dade to debit my credit card for the total amount. I have read and understand the cancellation/refund policy of this registration agreement.

Date _____ Signature _____

Questions? Call 786-390-7655 or e-mail: info@FPAMiamiDade.org