

The FPA Chapters of Fairfield County, Greater Hudson Valley & New York City

present

TECHNOLOGY TRENDS FOR 2008 & BEYOND:

How to Work Less & Make More!

A Joint Regional Conference

featuring

the dynamic technology/practice management duo of *Virtual Office News Fame*

JOEL BRUCKENSTEIN & DAVID DRUCKER

Friday, September 12, 2008

10:00 a.m. – 5:30 p.m. *(including lunch & cocktail reception)*

Holiday Inn, 700 East Main Street, Stamford, CT

The Top Three Reasons Why You Should Not Miss This Not-To-Be-Missed Event!

#1 – LEARN FROM THE TOP TWO INDUSTRY PROS

This is the first-ever FPA Joint Regional Technology Conference in the New York-Metro area featuring keynote speakers Joel Bruckenstein and David Drucker on *The Top Ten Challenges Facing Practitioners Today*. Having co-authored “Virtual Office Tools for a High Margin Practice,” Joel and David literally wrote the book on “how client-centered financial advisors can cut paperwork, overhead, and wasted hours,” as their tome is subtitled. They are the undeniable authorities on how financial planning professionals can utilize software, hardware and other technologies to improve and streamline their practices.

We are thrilled that Joel will be sharing with us his most-up-to-date research on the latest, greatest (and perhaps not-so-greatest) developments in technology. We guarantee that his presentation will provide the freshest content you’ll ever hear on the subject!

Dave’s presentation will enlighten us on **The Deadly Dozen - Learn to Avoid These 12 Costly Practitioner Mistakes** (*this program has been accepted by CFP Board for 1.5 hours of continuing education credit*). Here’s Dave’s **Deadly Dozen** List:

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|--|---|
| #1: Keep Doing Predominantly Commission Business | #7: Don’t Take Identity Theft Seriously |
| #2: Ignore All This “Boomer” Nonsense | #8: Hire a New Employee Every Time You Need More Help |
| #3: Never Survey Your Clients | #9: Exploit Summer Interns |
| #4: Keep Using Your Circa 1963 Rolodex for Client Contact Management | #10: Give Employees Rewards They Don’t Want |
| #5: Horde All the Paper You Can Get Your Hands On | #11: Don’t Plan Your Exit |
| #6: Never Ever Trust the Internet | #12: Don’t Give a Thought to Personal Productivity |

The net effect of the advisor NOT observing these 12 “Don’ts” is not only a more efficient and profitable practice, but better client service, too. When an independent, client-centered advisor works on his practice, he benefits both himself and his clients. Greater efficiency through adopting a robust CRM (#4) or establishing a paperless office (#5) translate into improved client service as much as activities more obviously beneficial to clients, like surveys to determine their needs/wants (#3) or protecting them against identity theft (#7). Client service, in Dave’s opinion, is the first key to success - of all types - in the financial services industry.

#2 – NETWORK WITH YOUR TRI-STATE PEERS

We are inviting over 2,000 financial planning professionals from the three host FPA chapters as well as our neighboring FPA Chapters in Connecticut, New Jersey and New York. With an average 10% attendance rate, this event presents a **rare opportunity for you to make extraordinary contacts and connect with potentially 200 or more of your peers from the tri-state area**. This is your chance to network with other professionals who are on the same page as you are, facing the varied challenges that are unique to the financial planning community.

#3 – DISCOVER THE LATEST & GREATEST TECHNOLOGY TRENDS

If you are like most financial planning professionals, you want to be current on the latest technology designed to help you manage your practice more effectively and more efficiently. **Who among us wouldn’t want to discover the technological tips, tools and products that can help us work less and make more?** To this end, we have set an agenda that offers significant one-on-one quality time throughout the day with approximately 35 exhibitors who provide technology and/or practice management support to the financial advisor community.

ADDITIONAL SESSIONS INCLUDE:



Everything You Always Wanted to Know (but didn't know who to ask) About How Technology Can Help You Work Less & Make More! - An Interactive Q&A Conversation with panelists **Joel Bruckenstein, David Drucker, George L. Taylor, CFP®**, President/Managing Director of Temenos, and **Vern C. Hayden, CFP®**, CEO/Founder, Hayden Wealth Management, all of whom will bring their own unique points of view to the table and field questions from the floor. Panel discussion will be moderated by **Peter T. Slavin, CLU, ChFC, LUTCF**, MetLife Financial Planner/Senior Financial Services Executive and FPA CT-Fairfield County Chapter President-elect.

“A View from the Trenches – A Virtual Office Real Life Story” as told by nationally recognized virtual office and technology expert **George L. Taylor**. George will share with us the practical issues and incredible benefits of using technology to create an effective and successful Virtual Office on a practice management level. This is your chance to hear an insider’s view of what it’s really like to live the Virtual Office Life!

Vern C. Hayden has been a Certified Financial Planning Practitioner™ since 1978. Active in financial planning circles for 39 years, Vern has been a board member of the CFP Board of Standards and has chaired the National Endowment for Financial Education, former parent organization of the College for Financial Planning, which created the CFP™ (Certified Financial Planner) designation. He was president of the North Bay California Chapter of the International Association of Financial Planners (IAFP) in 1975 and Founding President of the Westchester/Rockland Chapter IAFP in 1987. He also conducts financial education programs on behalf of many companies and charities. He has spoken at several financial and industry conventions. Hayden regularly appears on leading national news and financial television programs such as CNBC, NBC, Fox News and Bloomberg. CNBC branded Vern as “Mr. Mutual Fund”. He has been a regular contributor to the financial press, including CNBC.com and TheStreet.com, where he has about 100 columns. He is also a contributing writer for the Journal of Financial Planning and the American Association of Individual Investors Journal. His latest book is entitled “Getting An Investing Game Plan...Creating It...Working It...Winning It” published by John Wiley and Sons. He is working on a new book, tentatively entitled, “Free Markets and Funny Marketing”. Vern has been active in training financial planners in South Africa and Japan. The President of the Japanese Association of Financial Planners labeled him as the “Father of the Independent Financial Planner in Japan”.

George L. Taylor, CFP®, is President and Managing Director of Temenos, an independent SEC registered investment advisory and financial planning firm since January 1998. Previously, for 13 years at the Robinson Company, an employee benefits firm in Waterbury, George was Senior Vice President and head of its Investment Department. He has been a Certified Financial Planner since 1992. He has also attained his CLU and ChFC in 1998. He is a frequent speaker and writer on financial planning issues, having spoken at various local and statewide and national conferences. He recognized as a national expert on Life Planning, Virtual Office, and Technology. He has spoken at and served as a moderator at the annual Virtual Office Technology Conference. He has been featured in Virtual Office News as a monthly columnist, in Bob Veres’ "Inside Info" and the Morningstar's Advisor's Web site. For six years, George was a member of Financial Planning Association's national Government Relations Committee, which analyzes and develops FPA public policy positions on regulatory and legislative issues affecting the financial planning profession. He is a past president of the Fairfield Society of the CT FPA. He has served on the National FPA's Financial Planner Advisory Council which advised the national board on advisor issues. He was featured as "Planner of the Week" in the FPA Journal Online. Last year he chaired the track of “Client Trust and Communication” for the National FPA conference in Seattle He has been active in community affairs including chairing the Professional Advisor Sub-Committee for the Waterbury Foundation.

WE'D LIKE TO TAKE THIS OPPORTUNITY TO THANK THE FOLLOWING SPONSORS FOR SUPPORTING OUR CONFERENCE:

PLATINUM	GOLD	SILVER
	<p>Charles Schwab Institutional</p> <p>Morningstar</p>	<p>Accelerated Information Systems Advisors Assistant Champion Workflow Systems Client Marketing Services Financial Guidance (a division of Scivantage) Informa Investment Solutions Laserfiche Orion Advisor Services, LLC Pacific Life (IT Section) Protracker Software, Inc. Redtail Technology Smarsh Tamarac, Inc. Trust Company of America Upswing</p>
	<p>TD Ameritrade</p>	
<p>BRONZE: Keir Educational Resources & MoneyTree</p>		

If you would like to learn more about the Conference and/or available Sponsorship Packages, please contact Conference Administrator Lori Somerville at 877-777-0600 or Fairfield@fpact.org.

REGISTRATION FORM

Space is limited! Register ASAP to guarantee your admission!

Name _____

Company _____

Address _____

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Phone _____ Cell _____ Fax _____

FPA Chapter Affiliation _____ CFP Certicant # _____ and/or Last 4 Digits of SSN# _____

PLEASE CHECK YOUR APPLICABLE MEMBERSHIP STATUS BELOW
(if you are unsure of your membership status, please contact your local Chapter Administrator)

	<input type="checkbox"/> FPA MEMBER <i>Paid Local Dues Assessment or Season Pass member</i>	<input type="checkbox"/> FPA MEMBER <i>Not a Paid Local Dues Assessment or Season Pass member</i>	<input type="checkbox"/> NON-MEMBER
Pre-Registration Fee <i>received by September 5</i>	\$79	\$109	\$179
Registration Fee <i>received after September 5 or at door</i>	\$109	\$139	\$199

STUDENT: \$49.00*

***ATTENTION STUDENTS!**

Are you enrolled in a CFP certificate program, CFP Board registered degree program or related finance/business degree program? If so, we are offering you a special discounted rate to attend our Conference: Only \$49.00! It doesn't matter when you register or if you are a FPA member! *(however, early registration is strongly recommended because space is limited)*

Please note that registration fee is non-refundable.

PAYMENT

BY CHECK: Enclosed is my check for \$_____ (please make check payable to "FPA Greater Hudson Valley Chapter" and mail to: FPA GHV c/o Lori Somerville, 175 South End Road, #A2, East Haven, CT 06512-4555)

BY CREDIT CARD: Pay online using MasterCard or Visa. This option is available on the FPA Greater Hudson Valley Website (<http://www.fpaghv.org/store/Shop-FPAGHV.html>).