

The Utah Chapter of the Financial Planning Association is hosting their Annual Symposium for area financial planners on Friday, September 9th, 2011 at the Red Lion Hotel in downtown Salt Lake City. This will be a tremendous all-day educational event from 8 am to 5 pm. Agenda includes:

3rd Annual Symposium
of the Utah Chapter of the
Financial Planning Association
Friday, September 9, 2011
 8 am to 5 pm
Red Lion Hotel
 161 West 600 South

Keynote Speakers:

- ☆ Nick Raich, CFA, Senior Vice President, Director of Research, Key Private Bank
 “Best Opportunities for Stock Investors Over the Next 12-18 Months”
- ☆ James R. Beaudoin, CPA, PFS, CRP, Pinnock, Robbins, Posey & Richins
 “Tax Aspects of Health Care Reform”
- ☆ Jeff Thredgold, CSP, Economic Futurist, Zions Bank
 “The Economy—What’s Up”
- ☆ Marty Kurtz, CFP, AIFA, President of FPA National Board
 “The Future of Financial Planning: The Language of Money & Life”

The following afternoon educational 1 hour breakout sessions featuring current topics of interest will be offered. CE credit with the Board of Standards for Certified Financial Planners and the Utah Insurance Department is pending. Workshop sessions will be offered by the following:

- Utah Education Savings Plan: “How 529 College Savings Plans Can Benefit Your Clients—and You”
- Strong & Hanni: “Recognizing Legal Issues Your Planning Clients Need To Know”
- Alliance Benefit Group: “408b2 and 404a5—The Impact of Recent DOL Legislation on Retirement Today”
- Fidelity Insurance Company: “Advisor Strategies for Retirement Savings and Income Planning IV”
- American Funds Distributors: “Demystifying the Ratings Agencies”
- Moneytree Software: “Financial Planning Software Demonstration” no CE credit
- CFP Board Code of Ethics Principles – 1-3 pm – space limited so must register separately
- CFP Board Code of Ethics Principles – 3-5 pm – space limited so must register separately

REGISTRATION FEE	
UTAH FPA MEMBER:	\$40 (\$50 after September 2)
NONMEMBER:	\$90 (\$100 after September 2)
<i>Nonmembers who join FPA the day of the conference can get a \$50 rebate on their fee.</i>	

Registration is available online at UtahFPA.org

Please register early as space is limited! Register separately on the website to attend ethics sessions.

For further information, please go to www.UtahFPA.org

or contact Elaine Carter, FPA Utah Chapter Executive Director at fpaofutah@yahoo.com or 801-979-1484