FINANCIAL PLANNING ASSOCIATION OF MID-OREGON

Planning News

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FPA OF MID-OREGON MONTHLY CHAPTER MEETING

TUESDAY, DECEMBER 14, 2004

"GOALS, ROLES & SHARING IN THE FAMILY BUSINESS ORGANIZATION"

BY GWEN GRIFFITH, ATTORNEY

Gwendolyn Griffith is a shareholder in the Eugene, Oregon, law firm of Speer, Hoyt, Jones, Feinman, Poppe, Wolf & Griffith, P.C. She is a graduate of Stanford Law School (1981), and Rollins College (1978, Economics, with highest distinction). She has taught in several law schools, including Willamette University College of Law (1988-1999). Most recently she has been teaching as a Visiting Professor at the University of Oregon School of Law, teaching Federal Tax (2002, 2003) and Nonprofit Organizations (2004, 2005).

CEs Pending

PLUS SPECIAL DESSERT SOCIAL
TO CELEBRATE THE HOLIDAY SEASON

LUNCH 12:30
LUNCH SPEAKER 1:00 – 2:00
DESSERT SOCIAL 2:00 – 3:00

$15 FPA Member
$20 Non-Member

Luncheon with lunch speaker :
$25 FPA Member • $40 non-Member

Lunch 12:30 pm
Session 1:00-2:00

-1 hour Session-
FPA Member $25
Non-Member $40
(cost includes lunch)

Lunch only FPA member $15.00
each hour CE $10
Lunch only Non-Member $20
each hour CE $20

Downtown
Athletic Club
999 Willamette St., Eugene, OR

rsvp at:
LKats@yahoo.com
or 541.284.9855

PRESIDENTS NEWS • NOVEMBER 2004

Well, here we are, just as expected, shown receiving our Gold Level Chapter Recognition Award. The two people also in the picture are Elizabeth Jetton, CFP®, 2004 President of FPA and Timothy Wyman, CFP®, JD, 2004 Chapter Leadership Resource Council Chair. It's nice to be recognized for the highest level of achievement in providing a quality experience for our members. Four years ago, as a board, we adopted the newly organized Chapter Recognition standards to be ours as well, and you can see the results. I feel really good about this.

It also felt really good to see how impressed both Lindas Thomas-Bush and Barba were with the resources that are available at the national level of FPA. I believe they both came away with the idea that the organization not only offers excellent chapter and staff support, but that it's comprised of lots of leaders from the hundred other chapters who are proud and active members of the organization that supports the financial planning process. Each time I've been to a national meeting, I've returned reinvigorated about our organization, and our chosen profession.

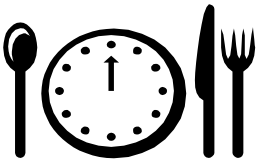
The meeting was well-run, efficient, and fun, with excellent accommodations, great speakers and facilitators, and wonderful food, beverage and entertainment. They made it bearable to be out of the office for a day, and away from our families for the weekend! Thanks to both Lindas for their investment for the chapter's benefit.

We've come back with an abundance of new ideas that we can and will implement over the course of the next year. The ideas came from others who have already completed them, or know of resource people who can help make them work. We'll hash through them at the Board meeting next week, and we'll preview for the chapter at our December meeting on the 14th at the DAC.

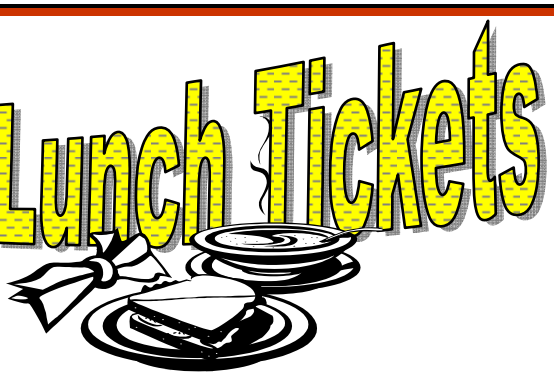
Be on the lookout for the Spring Symposium "Save the Date" postcard after the holidays. Once again, we're featuring Nick Murray, and the Estate Planning Council is bringing in Jeff Pennell. I guarantee you'll be pleased with their presentations. More detail to follow.

See you the 14th!

President



Annual Lunch Tickets



It's that time again!
Purchase your 2005 Chapter Meeting Luncheon Ticket and Save, Save, Save!

Take advantage of this great special and save money in your pocket while getting those CE requirements!

This year we'll be filling the calendar again with unprecedented hours of CE and invite members to join us at the Downtown Athletic Club to take advantage of this great membership benefit!

A total of 8 Monthly Chapter Meeting lunches
plus 1st hour Education (one hour per month)

$120.00

(a $200.00 value)

Don't miss out on this great deal!!
Special rate ends January 18th, 2005.
To purchase, call 541.284.9855 or email Lkats@yahoo.com.

THE FINANCIAL PLANNING ASSOCIATION OF MID-OREGON

MISSION STATEMENT

To **p**rovide an **e**ducational and **n**etworking **f**orum for **F**inancial **S**ervice **P**rofessionals that **i**ncreases **p**ublic **a**wareness of the **b**enefits of the **f**inancial **p**lanning **p**rocess and **p**romotes **h**igh **e**thical **s**tandards.

BECOME A MEMBER TODAY!

FPA of Mid-Oregon 2004-2005 Calendar of Upcoming Events

December 14, 2004
"Goals, Roles and Sharing — Family Wealth Transfer Planning"
Gwen Griffith, Attorney

followed by

Dessert Social to celebrate the holidays
hosted by The Oregon Community Foundation

January 13-14, 2005
Mid-Winter conference
sponsored by our sister chapter, FPA of Portland and SW Washington

January 18, 2005
"PERS Update"
Scott Warner,
PERS Advisor

wm GroupofFunds
Jackson National Life Insurance Company
PIMCO ADVISORS
PACIFIC LIFE
Taking the mystery out of estate planning THE CENTER FOR ESTATE PLANNING
KELMOORE INVESTMENT COMPANY, INC. We've Got You Covered™
HERSHNER HUNTER ANDREWS NEILL & SMITH, LLP LAW OFFICES
AQUILA℠ Group Of Funds
JONES&ROTH Certified Public Accountants

Heads up!

Spotlighted Host

The Oregon Community Foundation

The Oregon Community Foundation

Join your FPA colleagues for some holiday cheer!
The Oregon Community Foundation is pleased to host a dessert reception from 2:00-3:00 p.m. following the Dec. 14th chapter meeting. The good work of FPA members to create effective philanthropy is deeply appreciated by the Foundation's trustees, local leadership council, and the community.

SISTER CHAPTER FPA OF PORTLAND AND SW WASHINGTON EXTENDS CONFERENCE INVITATION TO FPA OF MID-OREGON MEMBERS

MID-WINTER CONFERENCE ¨ January 13 – 14, 2005 ¨ Portland Airport Holiday Inn

Dear Financial Planner Friends,

The annual FPA Mid-Winter Conference will be held at the Columbia Conference Center at the Portland Airport Holiday Inn. Once again, excellent speakers and programs are on tap for two days of exceptional continuing education.

Our keynote speaker Bob Veres will kick off the event with a lively and topical discussion of the Future of Financal Services.

Oregon State Insurance Law, presented by John Lenz, CFP, CLU, ChFC, will again be included in the conference registration. In addition, Russ McAlmond will conduct a two-hour session that satisfies both the CFP board and Insurance requirements (requiring additional registration).

We are providing special registration rates for financial planning paraprofessionals to make it easier for staff to attend. Early Bird Registration rates are available through December 17.

Make your plans now to attend this year's Mid-Winter Conference. Registration is simple! Register online at www.fpa-or.org.

We have a great location, special rates, and an outstanding educational program awaiting you!

We look forward to seeing you in Portland, January 13 and 14, 2005!

MID-WINTER CONFERENCE AGENDA

THURSDAY, JANUARY 13

7:30 – 8:30 am	Continental Breakfast & Exhibits
8:00 am - 8:15 am	WELCOME
8:10 am - 10:00 am	**The Future of Financial Services** Bob Veres
10:00 am - 10:30 am	Exhibits Open - morning break
10:30 am - 12:10 pm	**Creative Solutions Working With Not-For-Profits** Robert E. Wayland, CLU
12:15 pm - 1:15 pm	LUNCH - **Rebecca Pomering, FPA National Board of Directors**
1:15 pm - 1:45 pm	Exhibits Open
1:45 pm - 2:35 pm	**Estate Planning with Life Settlments** Gary Brecka
2:45 pm - 3:35 pm	**Charitable Retirement and Estate Planning Come of Age** Gene Christian
3:35 pm - 4:00 pm	Exhibits Open - Ice Cream Sundae Break
4:00 pm - 4:50 pm	**Hands on Diversification: Serious Collectibles** Donald Dee
5:00 pm - 6:30 pm	**Reception and Exhibits**

FRIDAY, JANUARY 14, 2005

8:30 am - 9:30 am	Continental Breakfast and Exhibits
7:45 am - 9:25 am	**CFP and Insurance Ethics** (Optional program at additional cost) Russ McAlmond, CFP, ChFC,CTFA, CRC, RFC
9:30 am - 11:10 am	**The Value of Life Insurance in Your Practice** Bill McKenna
11:10 am - noon	Exhibits Open
noon - 1:00 pm	LUNCH
1:00 pm - 1:50 pm	**Identity Theft** Jim Hudson and Rick Kam
2:00 pm - 2:50 pm	**Update on the Northwest Economy** John Mitchell, PhD, US Bancorp ***Sponsored by Aquila Group of Funds***
3:00 pm - 6:00 pm	**Oregon Statutes and Administrative Rules** (State Insurance Law) John Lenz, CFP, CLU, ChFC, Lenz Financial Group

FPA of Mid Oregon Board Of Directors

Michael Syman-Degler CLU
President
Syman-Degler Agency
541.345.9681

Linda Thomas-Bush, CFP®
President Elect
U.S. Bank Trust
541.465.4120

Scott Schultz
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Schultz & Assoc. Law Center 541.485.5515

Bernadette Warwick, CFP®
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541.747.2931

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Secretary
Patricia@financialresponsive.com

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Carter & Carter Financial, Inc.
541.683.2900

Mike Ritchey, CFP®
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David Bonebrake
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Scot Berryman, CFP® CIMA
Morgan Stanley
541- 683-3737

Jack Whitten, CLU
Greeter
Lincoln Financial Advisors
541.673.2298

Lori Kats and Linda Barba
Co-Executive Directors
LKats@yahoo.com
541.284.9855

UPCOMING EVENTS AT THE DOWNTOWN ATHLETIC CLUB

Jazz begins at 8:00 pm to 11:00 p.m. every Saturday evening in the AX BILLY GRILL SPORTS BAR on the third floor of the Downtown Athletic Club at 999 Willamette Street.

No Cover Charge, the public is welcome! 21 & up

- **Saturday December 4, 2004** *Mike Denny*
- **Saturday December 11, 2004** *Carl Woideck*
- **Saturday December 18, 2004** *Group Therapy*

SATURDAY NIGHT JAZZ AND THIRD THURSDAY WINE TASTING

Third Thursday Wine Tasting, December 16th, 5:30—7:00 p.m. Eola Hills will be featuring dessert wines. Come join us!

DOWNTOWN ATHLETIC CLUB AND CONFERENCE CENTER

FPA of Mid Oregon
P.O. Box 1452
Eugene, OR 97440
voicemail: 541.284.9855
www.financialplanningmid-oregon.org

CHAPTER MEETING INFORMATION

Chapter meetings are held January through December excluding June, July and August with a Symposium in May.

Monthly meetings include a buffet lunch, networking opportunities with allied professionals and a program designed to provide education and professional development.

Parking:

Parking is available and validated for the Over Park located on 10th & Oak St.

Guest Policy:

You are encouraged to bring a guest to a meeting. *First time* guests are free. Please include the name of guest when registering.

Cancellations:

Cancellations must be no later than 24 hours before meeting date.

Please Register ***at least 24 hours prior to the meeting*** date. Call FPA voicemail at 541.284.9855 or email LKats@yahoo.com.

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155 B Avenue, Suite 240
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Membership in the FPA…

A VALUABLE ASSET!

The FPA is a dynamic organization able to offer its members many benefits. As a member of the FPA, you will gain access to a combination of the best networking opportunities, peer reviewed publications, continuing education, practice management tools, and career development support. FPA is your link to the best resources available to help you succeed as a professional in the financial planning community.

For information regarding membership to the FPA please contact:
***Membership Director: David Bonebrake* 541.485.2639**
or
***Co-Executive Directors Lori Kats or Linda Barba* at LKats@yahoo.com or 541.284.9855.**
For membership information, visit the FPA National website at www.FPAnet.org. Applications are also available at our monthly Chapter Meetings held at the Downtown Athletic Club. Additional information regarding the FPA can be found at our website www.financialplanningmid-oregon.org.