

Lessons In Success

Join the FPA of North Alabama for our Eighth annual continuing education symposium.

We welcome members, non-members, CPAs, and attorneys for a day of learning and networking.

.....
Earn 8.0 hours CPE (includes
2 hours of CFP® Ethics)
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FPA of North Alabama
P.O. Box 26607
Birmingham, AL 35260

FPA
THE FINANCIAL PLANNING ASSOCIATION

of North Alabama
Presents our 8th
Annual CE
Symposium:

Lessons in Success



*November 5, 2009
Thursday*

Vestavia Country Club

7:30 am – 5:00 pm

*A Day of Continuing
Education*

Join Us

You are cordially invited to join the FPA of North Alabama at the Vestavia Country Club on November 5, 2009 for our 8th annual Continuing Education Symposium:

Lessons in Success

Earn **8.0 hours** of CPE credit if you attend the entire event.

Come hear nationally recognized speakers provide you with fresh ideas and tools to improve your practice and satisfy your CFP® ethics requirement. You will learn about an exciting alternative to prepaid burial plans; rebalancing strategies in the current financial environment; how financial media and financial outlets seduce your clients into poor decisions; how incorporating investment policy statements can improve client relations; and how the independent financial advisor will come to dominate the market.

Conference Agenda

- 7:30-8:00 Registration & Breakfast
8:00-9:15 Funeral Trusts: Bryan Adams
9:15-10:30 Investment Policy Statements: Norman Boone
10:30-11:00 Break
11:00-12:15 Rebalancing Strategies: Sheryl Rowling
12:15-1:15 Lunch: Celebration of FPA-NA
1:15-2:30 Investment Pornography: Ben Walker
2:30-3:00 Break
3:00-5:00 CFP® Ethics
3:00-5:00 Alternative: Declare Your Independence: Greg Powell

Sponsors

The FPA of North Alabama would like to thank our 2009 Platinum Partners and Symposium sponsors.



Registration Form

Name: _____

Firm: _____

Address: _____

City: _____

State/Zip: _____

Phone: _____

Email: _____

Ethics _____ or Alternative _____

Member of FPA: Yes/No

Dietary Restrictions ? _____

CFP®? Y__ N__ CFP® ID _____

Please enclose a check to FPA of North Alabama with your registration.

Cost for Symposium

\$145 for Members

\$195 for Non-Members

Early Registration Discount

If you register before **October 16th**:

\$125 for Members

\$175 for Non-members

Detach & Mail Form by October 31st to:

FPA of North Alabama

P.O. Box 26607

Birmingham, AL 35260

Contact Pat Morris at

fpa_na@bellsouth.net for more information or

kmaddox@wealthprotectionlaw.com for hotel information.