FPA of Iowa Symposium 2006

Thursday • November 9 • West Des Moines Marriott

8 Hours of Iowa Insurance and CFP Credits - Pending Approval

8:10-9:10 am, Keynote No. 1:

Homeland Security Issues and Challenges for the Private Sector

Ellen Gordon, Naval Post Graduate Center for Homeland Defense and Security

Ellen is Associate Director of the Naval Postgraduate School Center for Homeland Defense and Security and serves as subject matter expert in Homeland Security and Emergency Management. She formerly served as Governor Tom Vilsack's Homeland Security Advisor and was Iowa's Emergency Management Administrator. Included in her presentation will be a review of Iowa's work in the critical infrastructure program area.

9:25-10:20 am, Session No. 1:

Lease vs. Buy

Jim Usgaard and Kraig Kramme, Betts Cadillac

Jim Usgaard, a Certified Public Accountant since graduating from Northern Iowa in 1980, has been general manager of the Betts Auto Campus since 2001. He is a 2004 Leadership Iowa graduate. Kraig Kramme, a graduate of East High and Midland Lutheran College, has been Betts' Cadillac sales manager since 1996.

9:25-10:20 am, Session No. 2:

The Rollover Machine II

Andy Larson, Director of Retirement Education for Retirement Learning Center, LLC

Andy Larson has 23 years experience in the financial services industry. As a retirement industry executive, he ran the Consulting and Training group for Universal Pensions, Inc. (UPI) and headed the BISYS Corporate University. Brian Martin has been regional sales director for Columbia, covering Kansas, Iowa and Nebraska, for the past three years.

10:25-11:2 am, Session No. 3:

Complex Estate Planning in Simple Terms

Mike Deege, Wilson, Deege, Dollar & Despotovich Legal Group

Mike is an attorney, trust advisor, estate planner and private trustee. He got his law degree at Drake and has completed the Iowa School of Banking and the Graduate School of Banking at the University of Wisconsin in Madison. He has also attained the Certified Trust and Financial Advisor (CTFA) designation.

10:25-11:25 am, Session No. 4:

12 Great Client Connections

Rhonda Barrows, John Hancock Funds, LLC

Rhonda, a graduate of the University of Nebraska, is an outside wholesaler serving five states including Iowa and is based in Lincoln, Neb. Research shows that happy, loyal clients are in frequent contact with their advisors. Her presentation will offer 12 actionable ideas on how to deepen your relationships with clients.

11:40 am - 1 pm, Lunch & Keynote No. 2:

Million Dollar Babies - Legal and Emotional Aspects of Gifts and Bequests to Children

Ronnie Begleiter, Brown, Winick, Graves, Gross, Baskerville & Schoenebaum, P.L.C.

Ronnie is a Phi Beta Kappa graduate of Cornell University, has a masters degree with honors from Columbia and a law degree from Drake. She practices in the areas of employee benefits and estate planning. In her practice, she has handled the transfer of farms and closely held businesses between generations and has guided all sizes of estates through the probate process.

1:15-2:10 pm, Session No. 5:

Planning for Non-Traditional Couples

Rick Davis and Sharon Malheiro, sponsored by Calvert - Rep Scott Metz

Rick is a financial planner with Waddell & Reed, specializing in the area of financial planning for the non-traditional community. Sharon practices employment law and media and communications law. She is also an advocate for civil rights issues relating to the gay, lesbian, bisexual and transgendered community.

1:15-2:10 pm, Session No. 6:

Buying and Selling Businesses from A to Z - What You Should Know to Advise Your Clients or Why You Should Care

Ted Lodden, Brooks Lodden, P.C.

Ted has been managing partner of Brooks Lodden since 1984 and heads the firm's management advisory services department. He pioneered the firm's business evaluation and financial advisory services. A past president of the Iowa Society of CPAs, Ted has a Bachelors degree from Iowa State and his Masters of Business Administration with honors from Drake.

2:15-3:15 pm, Session No. 7:

The Pension Protection Act of 2006 – New Creative Planning Opportunities

Keith Gredys, Kidder Benefits

Bob is an employee benefits consultant with over 10 years of qualified plan design, document and administration servicing experience and is responsible for business development, consulting and client servicing in central and eastern Iowa and Illinois from his West Des Moines base.

2:15-3:15 pm, Session No. 8:

The Advantages of Owning REITs

Bob Niederhauser, Wells Real Estate

As a regional vice president, Bob conducts seminars throughout Iowa, North Dakota and South Dakota regarding the value of real estate in an effective asset allocation program. Before joining Wells, Bob served 18 years as an investment representative, planning investment strategies for individuals and businesses.

3:30–4:30 pm, Keynote No. 3:

How to Be a Chief Retirement Officer: Preparing Your Business for the Retirement Boom Ahead

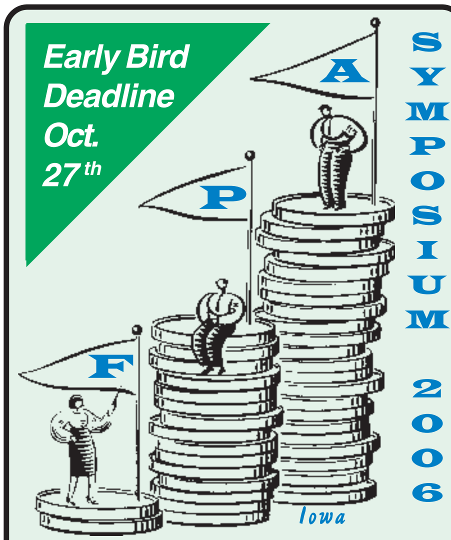
Thomas Rowley, Director, Van Kampen Investments

As an executive director and a member of the Van Kampen Strategy Group, Tom brings 20 years of insights and experience to retirement planning. The coming wave of baby boom retirement assets totals billions of dollars, creating a vast and potentially lucrative opportunity. His presentation will offer a practical guide on how to effectively capture and manage that market.

Register Today!

Updates posted online: http://www.fpaiowa.org/Symposium/Symposium.html

Early Bird Deadline Oct. 27th



A Huge "THANK YOU" to our DIAMOND PARTNER

who generously contributed to make this program possible:

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INVESTMENTS
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DON'T DELAY! REGISTER TODAY!

Rates:	By Oct 27th	After Oct 27th
Member	$145	$165
Non-Member	$195	$215

For a refund, cancellations must be received in writing before November 2nd.

Symposium 2006

Thursday, November 9th • West Des Moines Marriott

8 Hours of Iowa Insurance and CFP Credits - Pending Approval

Schedule

7:00 - 8:00 AM	Registration and Exhibitors and Breakfast
8:00 - 8:10 AM	Welcome
8:10 - 9:10 AM	**Keynote Ellen Gordon...Homeland Security Issues and Challenges for the Private Sector**
9:10 - 9:25 AM	Break
9:25 - 10:20 AM	CONCURRENT SESSIONS #1 and #2
	Session #1
	Betts Cadillac - Jim Usgaard and Kraig Kramme...Lease vs. Buy
	Session #2
	Andy Larson...The Rollover Machine II
10:25 - 11:25 AM	CONCURRENT SESSIONS #3 and #4
	Session #3
	Mike Deege...Complex Estate Planning in Simple Terms
	Session #4
	Rhonda Barrows...Twelve Great Client Connections
11:25 - 11:40 AM	Break
11:40 AM - 1 PM	**Lunch & Keynote - Ronnie Begleiter...Million Dollar Babies - Legal and Emotional Aspects of Gifts and Bequests to Children**
1:00 - 1:15 PM	Break
1:15 - 2:10 PM	CONCURRENT SESSIONS #5 and #6
	Session #5
	Rick Davis and Sharon Malheiro; Sponsored by Calvert / Rep Scott Metz...Planning for Non-Traditional Couples
	Session #6
	Ted Lodden...Buying and Selling Businesses from A to Z - What You Should Know to Advise Your Clients or Why You Should Care
2:15 - 3:15 PM	CONCURRENT SESSIONS #7 and #8
	Session #7
	Keith Gredys...The Pension Protection Act of 2006 - New Creative Planning Opportunities
	Session #8
	Bob Niederhauser...The Advantages of Owning REIT's
3:15 - 3:30 PM	Break
3:30 - 4:30 PM	**Keynote - Van Kampen Investments - Diamond Sponsor Thomas Rowley...How to be a Chief Retirement Officer - Preparing Your Business for the Retirement Boom Ahead**
4:30 - 6:00 PM	Networking Reception with cocktails and hors d' oeuvres

FPA of IOWA ... Symposium 2006: Registration

Name ________________________________ Badge Name ____________________

Designations ☐ CFP ☐ ChFC ☐ CLU ☐ CPA ☐ JD ☐ RFC ☐ Other

Company ____

Address____

City ____ Zip __________________

Email ___________________________ Phone ________________ Fax ________________

☐ I require a vegetarian lunch.

November 9th, 2006 • West Des Moines Marriott

Return along with your registration fee to FPA of Iowa, 15130 New York Circle • Clive, IA 50325