



FPA OF VENTURA COUNTY  
FINANCIAL PLANNING ASSOCIATION

SERVING LOS ANGELES, SANTA BARBARA, SAN LUIS OBISPO AND VENTURA COUNTIES.



# President's Message



One of the more brilliant ideas to come out of the national Financial Planning Association founding members was to emphasize and empower regional chapters. Each chapter has its own unique "flavor" and approach, but this set up of dozens of regional chapters throughout the country has allowed the FPA to serve planners in a much deeper and more intimate manner than the traditional top-down national organization.

I felt that connection with the people in the Ventura Chapter of the FPA during

my very first educational meeting. It has kept me driving from San Luis Obispo to all but one quarterly meeting in the past eight years. It is also why I have been happy to serve as your president this year - just a small way to give back for all that I have received from members, educational speakers and resource partners.

In past newsletters, we have spent a lot of paper and ink talking about all the projects we are involved with as FPA of Ventura - Pro-Bono, study groups,

SEE PRESIDENT...continued on page 2

*The Financial Planning Association of Ventura County promotes the financial planning process and CFP designation through quality education and high ethical standards to benefit the financial planning profession and our community.*

*We are here to personally support the community of those who are committed to Financial Planning.*

THANKS TO OUR SPONSORS AND PARTNERS WHO ENABLE US TO BRING YOU THE BEST IN EDUCATIONAL SPREAKERS & PROGRAMS!



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**PRESIDENT**...continued from page 1

mixers, education, mentoring, incredible speaker programs and our efforts at the state and national level to be a bigger voice within the legislative and regulatory process.

As a board, we have been a busy bunch and have had many successes. Your current crew on this year's Board of Directors are some of the most accomplished, focused and successful people in the financial planning community. We are all making every effort to carry on the tradition of past FPA Ventura leaders who made us feel so welcome and at home with this organization when we were just getting started.

I am extremely honored to work with these people and would happily go on for hours about everything they've already done and are on track to accomplish through the rest of this year ... But for this quarterly newsletter, we all wanted to focus on some unsung heroes who make everything we are doing with our chapter possible - those are our Resource Partners.

Resource Partners pony up the money our chapter needs to bring in those top-notch speakers you get to see every quarter. They subsidize our meeting costs so we can give you a half-day program with great food and a professional meeting space and charge only \$45 for the whole thing. FPA of Ventura members who wish to save more money and buy the season

pass - which lowers the cost of those quarterly meetings to just \$25 per session - are also being subsidized by the generosity of our Resource Partners.

Yes, a portion of your national dues does find its way to the local chapter, but that is not enough to pay a top-notch speaker a few thousand dollars plus air-travel and accommodations as well as cover the costs of meeting space and food.

Finally, the Resource Partners are just that - PARTNERS for you and your practice. They provide support, tools, products and research to go deep into areas where you may not be an expert - like mortgages (both forward and reverse), elder care, annuity and insurance products, alternative investment strategies and more.

We've given our current resource partners more space in this newsletter than usual. I encourage you to contact them, ask questions and learn about how they can help you be better at whatever you do. They are an important part of our mission at the Ventura Chapter of the FPA to "to support the community of those who are committed to financial planning."

*John D. Buerger, CFP®*  
2013 President

### **SUPPORT THOSE WHO SUPPORT OUR FINANCIAL PLANNING COMMUNITY**

**California Lutheran University** Dr. Somnath Basu  
805-493-3980 [basu@callutheran.edu](mailto:basu@callutheran.edu)

**Jefferson National** Jeff Rancourt 866-667-0564  
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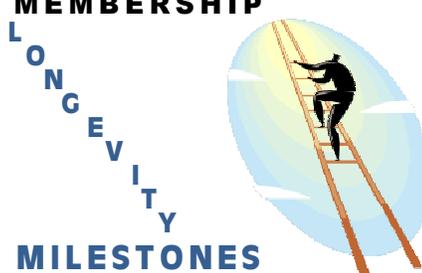
**Liberty Home Equity Solutions**  
Chris Sinnett 818-584-5750  
[www.libertyadvisor.com](http://www.libertyadvisor.com)

**Santa Barbara Foundation**  
Jan Campbell 805-963-1873  
[www.sbfoundation.org](http://www.sbfoundation.org)

**SFC Financial Network a division of Skyline**  
Mark Klein 818-865-0600  
[www.sfcfn.com](http://www.sfcfn.com)

**UnitedHealthCare** Sandy D'Elia 805-501-0319  
[www.uhc.com](http://www.uhc.com)

## MEMBERSHIP



## MILESTONES

We would like to acknowledge and congratulate our longstanding members. Happy Anniversary!

<u>NOVEMBER</u>	<u>YRS</u>	<u>FEBRUARY</u>	<u>YRS</u>
Patricia A. Fahnoe	15	Yvonne M. Wood	15
Paul J. Norr	5	<u>MARCH</u>	
Lawrence Blonquist	15	Kenneth W. Kossoff	10
Kevin P. Farrell	5	<u>APRIL</u>	
<u>DECEMBER</u>		Malcolm G. Meador	10
Deborah F. Reed	15		
<u>JANUARY</u>			
Eva Barberi	5		

Visit our Chapter website to make your reservation today! [www.fpaventura.org](http://www.fpaventura.org)

**VENTURA CO  
CHAPTER**  
Next Quarterly  
Meeting



Friday,  
April 19, 2013

Lundring Event Center at Calif. Lutheran University  
60 West Olsen Rd., Thousand Oaks, CA

8:00 a.m. to 12:00 Noon

\$45 Members  
\$65 Nonmembers

Registration deadline: April 16th