



Friday, August 18, 2017

8:00 AM – Noon

SPANISH HILLS COUNTRY CLUB

999 Crestview Avenue, Camarillo, CA 93010

Exit the 101 freeway at Las Posas Road. Head North (towards the mountains) on Las Posas. When Las Posas turns right continue straight onto Crestview Avenue. Follow Crestview for about one mile. Spanish Hills Country Club will be on the right.

WEALTH PLANNING FOR CROSS-BORDER FAMILIES



presented by **Andrew Fisher, CFA, CPA**

This talk will be an interactive exploration of the main areas of confusion among these cross-border families: those who are either American citizens having assets or interest abroad or foreign citizens in the U.S. Topics covered include: banking and currencies, real estate, international taxes, investing, retirement savings plans, retirement, and estate planning.

Andrew Fisher is widely regarded as a leading wealth advisor to cross-border families. He frequently writes and speaks to the unique financial planning and investment complexities faced by international families. He is author of *The Cross-Border Family Wealth Guide* and president and founder of *Worldview Wealth Advisors*, an independent wealth management firm advising globally oriented families.

Complexity: Advanced / **CFP Principal Knowledge Topic:** Investing, Taxation and Estate Planning / **CFP CE Credit:** 1.0 hours expected

THE 5 MOST COMMON MISTAKES IN IRA WEALTH TRANSFERS

presented by **Christine Roberts, J.D.**

This session will cover critical errors pertaining to beneficiary designations and "boilerplate" IRA language of which advisors may not be aware. It will also address creditor protection of IRA and other retirement account assets.



Christine Roberts is a partner at Mullen & Henzel LLP, Attorneys at Law. She practices exclusively in the area of employment benefits and employment law, with particular emphasis on pension and welfare benefit plan compliance under the Employee Retirement Income Security Act of 1974 ("ERISA"). She works with small and mid-sized, privately held businesses (from 50 to 250 employees).

Complexity: Intermediate / **CFP Principal Knowledge Topic :** Qualified plans rules and options / **CFP CE Credit:** 1 hour expected

REGISTER TODAY! Early Bird Discount ends July 31st/ Reservations deadline Aug. 15th Register online at www.FPAventura.org or by phone **877-281-0675** and choose #1. Credit cards accepted online. Make checks payable to "FPA Ventura" and mail to PO Box 188, Camarillo CA, 93011. \$45 for FPA members /\$65 non-members **before Aug. 1.** \$50 members/ \$70 non-members after July 31. (No refunds after Aug. 15th.)

"The mission of the Financial Planning Association of Ventura County is to strengthen and support the local community of those who are committed to financial planning as a practice and profession."