



OF VENTURA COUNTY

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FPA of Ventura County
PO Box 188, Camarillo, CA 93011-0188
www.fpaventura.org (877) 281-0675

Friday, February 15, 2019

8:00 AM – Noon

PLEASE BE PROMPT: program will begin 15 minutes earlier than usual, approx. 8:15AM

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 and Spanish Hills Country Club will be on the right.

NEW STANDARDS FOR A FIDUCIARY WORLD: UNDERSTANDING CFP BOARD'S REVISIONS

presented by **Dan Candura, CFP®** – President, Candura Group LLC

This presentation continues the engaging presentations that audiences expect from Candura Group. The course's use of polls, videos and case studies keeps attendees engaged as they learn the objectives required by CFP Board. The program delivers a comprehensive, in-depth review of the updates to CFP Board's Standards of Professional Conduct effective Oct. 1, 2019.



Dan Candura, CFP®

Dan, founder of Candura Group, LLC provides ethics training across the USA, Canada, Europe and Australia. He is President of PennyTree Advisers, LLC where he provides personal financial and retirement planning for consumers and litigation support for attorneys. He has taught at Sawyer School of Business at Suffolk University in Boston, is a FINRA arbitrator and a CFP Ambassador for the Boston area. Dan was a featured expert on PBS's documentary Retirement Revolution, profiled in The Journal of Financial Planning and has been quoted in numerous publications. He served on the Board of Directors of The Certified Financial Planner Board of Standards, Inc., is past Chair of the Board of Professional Review and is a member of Financial Planning Association and a NAPFA registered planner.

Career Stage: All / Competency: Business and Practice Management / CFP Topic List: Ethics / CFP CE Credit: 2.0 Hours

CHARITABLE PLANNING ESSENTIALS AND COMPLEX ASSET CONTRIBUTIONS

presented by **Stephen M. Brooks, CFP®, CAP, MBA** – Fidelity Charitable®



Stephen M. Brooks
CFP®, CAP, MBA

Develop a deeper understanding of charitable planning implications for the advisor on many fronts through this presentation. It looks at charitable planning with exploration of different vehicles with a deeper dive of Donor Advised Funds (DAF) looking at tax, estate planning and adopting the changes of the 2017 Tax Act. It will focus on how to give often overlooked appreciated assets like private business interests, real estate and other illiquid assets.

Stephen Brooks joined Fidelity Charitable® in 2011 as their west coast divisional fundraising manager. He leads a team of charitable planning specialists who serve as a premier resource on philanthropic planning for advisors and their clients. Steve previously worked for Fidelity Investments where he was senior vice president of intermediary sales. He graduated from the University of Florida with a Bachelor of Science, received his MBA from Colorado State University, is a Certified Financial Planner and Chartered Advisor in Philanthropy.

Career Stage: All / Competency: Business and Practice Management, Technical Knowledge / CFP Topic List: General Principles of Financial Planning, Tax Planning, Estate Planning / CFP CE Credit: 1.0 Hours

REGISTER TODAY! Early Bird Discount ends January 31 / Reservations deadline February 12th Register online at www.FPAventura.org or by phone 877-281-0675 option #1. Credit cards accepted online. Make checks payable to "FPA Ventura" and mail to PO Box 188, Camarillo CA, 93011. Early-bird Fees \$50 for FPA members /\$70 non-members after Jan 31st, \$55 members/ \$75 non-members. **Members Only** 2019 Season Pass \$110 - Pass Holders register online using your 2019 Season Pass discount code or contact Rachel. (No refunds after Feb.12th.) **Please note: New 2019 fees.**

"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."