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**PRESENTER**

***Dan Kullman***
*Director of Education & Training*
*Toews Corporation*

**PRESENTER**

***Dina Mabry***
*Owner,*
*BGA Premium Insurance Solutions*

**REGISTER TODAY!**

**Early Bird rates thru July 31st**

**Member:** $50 **Non-Member:** $70

**After August 1st**

**Member:** $55 **Non-Member:** $75

**Member Students: $25**

***(no refunds after 8/13/19)***

FPA OF VENTURA COUNTY
FINANCIAL PLANNING ASSOCIATION

# Friday, August 16, 2019

## 8:00 AM - Noon

## LUNDRING EVENTS CENTER @ Calif. Lutheran University

**60 West Olsen Road, Thousand Oaks, CA 93160**

*From the 101, take 23 North to Olsen Road. Go west toward the university. The Lundring Events Center is located within the Gilbert Sports and Fitness Center at the northwest corner of Olsen and Mountclef, adjacent to the swimming pool.*

## TOPIC & SPEAKER BIO

### MANAGING INVESTOR BEHAVIOR Presented by Dan Kullman

There is an ever-increasing amount of information available about behavioral finance and abundant evidence of the average investor's poor ability to navigate markets. This presentation distills a wealth of information about investor behavior into practical tools and process. The intended outcome is to train advisors to implement investor behavioral considerations when building portfolios, create greater client understanding and deeper client relationships, and improve competitive differentiation.

**Dan is Director of Education and Training at Toews. He is passionate about helping advisors and their investors overcome common and corrosive biases. He has been instrumental in translating behavioral investing theory into practical tools and processes for the advisory community. He helps develop and oversee Toews Managing Investor Behavior™ Workshop and Coaching Program. He also facilitates communications between the investment management team at Toews and its partners and producing advisors. Dan started his career as a stock-broker for Lehman Brothers, before becoming a founding member of an Equity and Fixed Income Money Manager and more recently acted as an advisor consultant with FTJ Fundchoice. He received a BBA in Finance from Univ of Houston 1992, holds a Series 7 & 65 licenses. He lives in Houston, TX with his wife and daughter.**

**Career Stage:** All/ **Competency:** Business and Practice Management, Relationship and Communication Skills **CFP Topic List:** Investment Planning/ **CFP CE Credit:** 1.5 hours expected

### REASONS TO PROTECT YOUR CLIENTS' FROM LIVING A LONG LIFE Presented by Dina Mabry

A catastrophic long term event can rapidly deplete assets. This presentation will review options available for clients to protect themselves, their families and their estate. It will look at how repositioning assets today can offer leverage for tax free dollars for long-term care. Understanding reimbursement vs indemnity offerings and which carriers are best for which type of client.

**Dina received her BA in Sociology from Loyola Marymount University. She spent a large part of her sales career in the pharmaceutical industry as a sales and management leader at Bristol Myers Squibb. Her background has strengthened BGA's presence among financial service professionals, attorneys and CPAs in all states. Although her focus is in the areas of life, long-term care, disability and annuities, Dina's passion is the combination products of Life/LTC. She is a trusted resource for all options to protect clients' estates from an extended long-term care event.**

**Career Stage:** All/ **Competency:** Business and Practice Management, Relationship Skills, Sales and Marketing/ **CFP Topic List:** Risk Management and Insurance Planning, Tax and Estate Planning/ **CFP CE Credit:** 1.0 hour expected

Register online 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. **Season Pass Holders** - Register online using your discount code or RSVP to Rachel at RachelFPAVta@hotmail.com.

"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."