



## Friday, May 17, 2019

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 and Spanish Hills Country Club will be on the right.

#### UTILIZING INSURANCE IN A FEE-ONLY PRACTICE

presented by **Timothy Rembowski**, – Senior Consultant, DPL Financial Partners

This presentation is divided into three parts. **1.** Discussions on the problem RIA’s have with the insurance industry, cost and commission driven and **2.** The three ways RIA’s should be leveraging insurance. **3.** Compare commission vs commission free product pricing. Will include some sample implementation and best practices on how to fee bill on insurance as a fee-only advisor.

*Tim Rembowski is a Senior Consultant at DPL Financial Partners, an unbiased insurance network for RIAs that brings low-cost Commission-Free insurance products to fee-only advisors. He is passionate about helping RIAs understand and leverage new commission-free insurance products as an investment asset for their clients. Before joining DPL Financial Partners, Tim worked in the RIA channel for four years distributing product for a national distributor. He holds his Series 6, Series 63 and Kentucky Life Insurance License.*



Tim Rembowski

**Career Stage:** II -Mid / **Competency:** Business and Practice Management, Technical Knowledge, Relationship Skills / **CFP Topic List:** General Principals of FP, Risk Management and Insurance Planning, Retirement Savings and Income Planning / **CFP CE Credit:** 1.0 Hour expected

#### SELLING A PLANNING PRACTICE: THE RELATIONSHIP BETWEEN REVENUE MULTIPLE AND REVENUE SIZE

presented by **Chia-Li Chien, PhD, CFP®, PMP** – California Lutheran University

This presentation will convey important information on how to successfully exit a financial planning practice. Planners often rely on appraisers or financial intermediaries to facilitate the exit or succession transition. Results suggest specialized financial intermediaries favored sellers but not buyers. Financial statement items alone did not provide a complete picture of the fair market value. Industry adjustments such as the quality of a practice’s clients, the quality of the team, and the quality of the platform tend to reside only within specialized financial intermediaries.

**Chia-Li Chien, PhD, CFP®, PMP** is Succession Program Director of Value Growth Institute, dedicated to helping women business owners increase the equity value of their firms. She is the award-winning author of 2 books “Show Me the Money” and “Work Toward Reward.” Her blog and newsletter were named Top Small Business Resource by the New York Times You’re the Boss blog. She is an Assistant Professor and Director of Financial Planning Program at California Lutheran University. Chia-Li has served as Chair and President of FPA of Charlotte and as Chair of the Pro Bono Advisory Committee for FPA on the national level.



Chia-Li Chien  
PhD, CFP®, PMP

**Career Stage:** II-Mid / **Competency:** Business and Practice Management, Sales and Marketing / **CFP Topic List:** Estate Planning / **CFP CE Credit:** 1.0 Hour expected

**REGISTER TODAY!** Early Bird Discount ends April 30<sup>th</sup>/Reservations deadline May 14<sup>th</sup> Register online at [www.FPAventura.org](http://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 April 30<sup>th</sup>, \$55 members/ \$75 non-members. **Season Pass Holders:** register online using your Season Pass discount code or contact Rachel. (No refunds after May 14<sup>th</sup>.)

“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.”