



Orange County Chapter

PRESIDENT'S UPDATE
February 15, 2008

Mark K. Rylance, CFP®
2008 President

Thanks to the hard work and volunteer effort by our members, board of directors, and committees our chapter received the "Gold Level Award" for the 7th straight year in 2007. Out of the 100+ chapters in the country, only 6 have achieved such distinction.

We have a terrific year scheduled beginning with our first quarterly meeting next Wednesday. There are 6 hours of CFP® CE credits up for grabs.

FEBRUARY 20th QUARTERLY MEETING:

- **Michael J. Wittick**, of the Law Offices of Michael J. Wittick "Reasons to Recommend an IRA Trust"
- **Gene Fama, Jr.**, of Dimensional Fund Advisors "Dimensions of Investing"
- **Peter Kote** of Professional Fiduciary Services and **Steve Hubbs** of First American Trust "Attorneys draft them and Trustees drive them: Practical Trust Tips from the Professionals"
- **Amy Hirsh Robinson** of Interchange Group "Navigating Generational Diversity: Critical Issues for Financial Planning Professionals"
- **Tom Higgins** of Payden Funds "Economic Update"
- **Vicki Mulak** of American Financial and Tax "2008 Tax Update"

Check our web site www.fpaocc.org for registration and program details.

KEY DATES:

April 22nd Orange County Register Call-in. To register contact Mandy Woo at 949-660-4629 or email Mandy.M.Woo@ampf.com or Edward Manko at 949-250-3210 or email Edward.J.Manko@ampf.com.

May 30th Junior Achievement – Deerfield Elementary in Irvine (Grades K-6). For more information contact Paul Kirz at (562) 698-7946 or email PKirz@aol.com.

June 16th Annual FPA Golf Tournament sponsored by Wells Capital at Yorba Linda Country Club. For more information contact Bob Hill 949-388-4455 or email bobhillfp@yahoo.com.

October 17th Planners Resource Day features keynote speaker, Harold Evensky. Contact Lauren Klein at (949) 477-4990 or email Lauren@KleinAdvisors.com.

THANK YOU TO OUR PARTNERS

Platinum Partners

Brown & Streza, LLC - David Allen Brown (949) 453-2900
Payden Funds – Brenda O’Leary (213) 830-4207
The Alliance Portfolio - James Perry (800) 363-1456
Thornburg Investment Management - John Gould (877) 215-1330 x5125

Gold Partners

American Funds - Cindy Thompson (877) 421-5330
Federated Investors – Dayna Haferkamp (760) 633-3401
KBS Capital Markets Group - Steven Williams (949) 233-7853
MFS - Rob Forrester (949) 887-6222
Pacific Life - Kim Schultz (800) 722-2333 x2381
Laserfiche – Marcel Tsai (562) 988-1688

Silver Partners

DWS Scudder – Patrick Kearns (415) 823-5112
First Eagle Funds – Mike Furlong (949) 829-9641
The Biz Sherpa – Peggy A. Mengel (858) 485-1001
TIAA-CREF – Shalisa Beckman (925) 200-7374
Nuveen Investments – Jaime Saul (949) 440-4800
Ameriprise Financial – Tucker Watkins (949) 263-9001 x15
Jackson National Life – Jason Pacheco (760) 694-5972
Charles Schwab – Grace Schlichter (949) 720-4956
Allianz Life – Felicia Corbett (619) 379-5739

COMMITTEE INVOLVEMENT

You can maximize your professional development and make a lot of new friends through active participation in one of our committees or activities. I invite you to explore these opportunities by contacting the committee leaders or attending one of their meetings.

- **Education Committee.** Headed by [Evelyn Zohlen \(714\) 971-0663](#), this committee plans our quarterly education programs and arranges speakers for continuing education credit.
- **Pro-Bono/Community Service.** [Angie Grillo \(949\) 584-8188](#) leads this committee of member volunteers who provide financial education to residents of a local battered women's shelter; to school children through the Junior Achievement program; and financial planning advice to the public through the *Orange County Register* Hotline program.
- **Membership.** Develops membership through outreach programs. [George Agopian \(714\) 547-4008](#) heads our membership development activities.
- **Member Benefits.** This committee arranges study groups for new and experienced planners, conducts our annual golf tournament and runs our internship program. Contact [Michael Darany](#) for more information (714-838-2212).
- **Allied Professionals.** This energetic committee seeks to build connections to other professional advisors. It is lead by Dr. [Dennis Barker \(949-341-0000\)](#)
- **Communications.** This committee heads up our technology and communication initiatives. It is lead by [Nancy Carr \(949-855-0324\)](#)
- **Public Relations.** This committee seeks to spread the word of our chapter's incredible pro bono and community service programs. It is lead by [Aaron Newland \(562-673-2445\)](#)
- **Planner's Resource Day.** [Lauren Klein \(949-477-4990\)](#) heads up this committee in charge of planning and executing our Planner's Resource Day every October.
- **Partners Program.** This committee helps our chapter sponsors reach out to our members. It is lead by [Carolanne Chavanne \(714-424-3823\)](#)