

FPA

THE FINANCIAL PLANNING ASSOCIATION
OF ORANGE COUNTY CALIFORNIA

Mark K. Rylance CFP®
President



PRESIDENT'S MESSAGE

April 2, 2008

UPCOMING COMMUNITY SERVICE / PRO BONO EVENTS

April 22nd - Orange County Register Call-in

Team up with the *Orange County Register* to provide free financial guidance to Orange County residents. Volunteer your expertise through telephone, E-mail or in-person consultations. We are still in need of volunteers.

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).

This is one of the most entertaining and rewarding projects you can get involved in as a member of the FPA. Junior Achievement provides the materials, you provide the financial knowledge. Junior Achievement is the world's largest organization dedicated to educating students about work readiness, entrepreneurship and financial literacy through experiential, hands-on programs.

Having participated the last several years, I guarantee you'll be inspired. 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.



MAY QUARTERLY MEETING

NOTE: Our May meeting will be held at the UCI Student Center. Go to www.fpaocc.org for directions and further details!

- **Christina Sfakianos**, SVP of Structured Equity Marketing at Lehman Brothers, *"An Introduction to Structured Products"*
- **Jon Gallo**, Attorney with Greenberg Glusker, *"Everything You Always Wanted to Know About the Generation-Skipping Tax"*
- **Scott Weiner, PhD**, Managing Principal of Payden & Rygel *"International Investing and Global Asset Allocation"*
- **Geoff Davey**, Director of Research and International Business with FinaMetrica, *"Managing Risk Tolerance"*
- **James Perry** of The Alliance Portfolio, *"The Advanced Financial Planning Uses of Alternative High-Yield Investments"*

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

OTHER KEY DATES

October 17th Planners Resource Day features keynote speakers John Mauldin, Esmael Adibi, Hugh Massie, and Mark Yusko. 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 ([714-838-8900](#)).
- **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 \(714-424-3823\)](#).

Visit our website at: www.fpaocc.org.

P.O. Box 16474, Irvine, CA 92623-6474 | t: 1-877-OCCFPA-9