

FPA Newsletter January 2018 – FPA NorCal Conference

We all have a unique story to tell. Ours is the story and 46-year legacy of “inspiring excellence and fostering community” that has made the FPA NorCal Conference one of the most respected conferences in our industry.

A committee of financial industry volunteers works to deliver what Michael Kitces has described as a “perennial top conference for advisors based on its high-quality advanced content.” With research and care, speakers are invited whose respective areas of expertise and experience put them at the top of their profession. The committee plans a program that addresses current topics covering a broad range of financial planning subjects—high-level content for experienced professionals. Here is a sneak peek of some of our Workshop Session Speakers who will be a part of the 2018 story of FPA NorCal.

[Brandon Odell](#) – Partner and Director of Business Consulting at the Ensemble Practice. Brandon also serves as faculty for the Ensemble Management Institute, an intensive program of business management classes for independent advisory firms. His presentation is *Good Firms Focus on Clients, Great Firms Focus on Staff*.

[Carolyn McClanahan](#) – Physician turned financial planner/CFP®. Carolyn speaks on the interplay between health and financial issues in an insightful, engaging and entertaining way. She writes for Forbes and Financial Planning Magazine and is quoted regularly in the Washington Post, CNBC, and NPR, and is also an op-ed contributor to the New York Times. Her presentation is *The Latest and Greatest in Health Care Policy, Payment, and How to Help Clients Navigate the Morass*.

[Michael Kitces](#) – Partner and Director of Wealth Management for Pinnacle Advisory Group. Michael is co-founder of XY Planning Network and New Planner Recruiting. He is known for delivering easy-to-understand information on cutting-edge topics that affect our industry. His two presentations are *Strategies for Managing Sequence of Return Risk in Retirement* and *Best Practices in Social Media and Digital Marketing for Financial Advisors*.

[Russell Redenbaugh](#) – 50 years’ experience as an investor and economist. Blinded at the age of 16, he graduated at the top of his class at Wharton. Russell served under three U.S. Presidents as a Commissioner on the U.S. Civil Rights Commission. In addition, he won three gold medals in the world jujitsu competition in Brazil, fighting sighted opponents. His presentation is *Policy Based Investing: How Shifts in Government Policy Impact Asset Prices*.

[Susan Bradley](#) – Founder of the Sudden Money Institute. She developed her business around creating processes and tools for clients going through transitions. Her presentation is *The Age of The Human Being: The Age that will Change the Financial Planning Profession*.

The FPA NorCal Conference is also known for building community and connection among sponsors, committee and attendees. Our sponsor support allows us to keep our registration fees reasonable. A big thank you for all our sponsors – see our website, www.FPANorCal, for a list of our 2018 sponsors.

This year, Wade Pitts, our 2018 Conference Chair, is emphasizing community building with a focus on “Made in the Bay.” A majority of the professionals who attend the NorCal Conference started their careers in the Bay Area. They worked hard, made connections and built their unique story in San Francisco, one of the financial cities known throughout the world. “Made in the Bay” will introduce our attendees to ten businesses whose story is tied to the Bay Area. At the conference, you can visit with them and hear their stories.

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The 46th Annual FPA NorCal conference is one that you want to be sure to attend! Not only will there be speakers that inspire you in your business and in life, you will also have the opportunity to connect with a like-minded community of professionals. It's a wonderful time to share your story and hear their stories. Relationships developed at conference could be the start of something big!

Early Bird Registration opened mid-December 2017. If you have not registered for the conference yet...DO IT NOW! (The 2017 conference sold out very early.) See you May 29 and 30, 2018 at The Palace Hotel in San Francisco!

46th Annual FPA NorCal Conference
May 29-30, 2018
The Palace Hotel, San Francisco
www.fpanorcal.org