



Track A	Special Events	Track D	Processes
Track B	Client Communications	Track E	Essential Expertise
Track C	Practice Efficiencies	Track F	ACA & You

LAST UPDATED 07/30/2010

WEDNESDAY, October 20, 2010

3:00 pm – 6:00 pm	Registration
7:00 pm – 10:00 pm	Welcome Reception! Enjoy seeing old friends while you meet new ones. Dinner will be served. Cash bar available.

THURSDAY, October 21, 2010

7:00 am – 8:00 am	Breakfast
8:30 am – 9:00 am	Welcome and Cheers, ACA! Judy McNary, chair of the 2010 Conference Committee, officially convenes the 2010 ACA Conference and welcomes you to "where everybody knows your name...and you're always glad you came"!
9:00 am – 10:30 am	Keynote Address: Bert Whitehead It's what you know <i>and</i> who you know – keys to building a great business Bert Whitehead, ACA System™ founder, shares information that every advisor can use to create and sustain a successful advisory business. His address includes the merits of leveraging fellow ACA members' knowledge and creativity, the effective use of SPARC for client satisfaction and retention, and a close look at the mistakes advisors make that hinder their success. Track E
10:30am – 11:00 am	Morning Break with Our Sponsors
11:00 am - 12:30 pm	Mr. Boston's Official Bartending Practice Management Guide: So Easy Even Coach Would Be Productive ACA all-stars Elizabeth Barrett, Robert Walsh, Susan Strasbaugh, and Chris Currin share their methods for using systems to maximize practice efficiency. Topics include outsourcing, staff (or not), and technology. Don't miss this opportunity to learn from their successes and missteps and get the tips you need to move your practice up in the standings. Track C
12:30 pm – 2:00 pm	Lunch – Sponsor Introductions
12:30 pm – 2:00 pm	Companion Lunch Is your companion joining you this year? Make sure they register for this private lunch just for our companion guests.
2:00pm – 3:30 pm	Annual Meeting / Board-Community Café The annual meeting of the Alliance of Cambridge Advisors, Inc., followed by a heart-to-heart discussion between members and the ACA board of directors. Track F
3:30 pm – 4:00 pm	Afternoon Break

Exhibits Open



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THURSDAY, October 21, 2010 cont.

4:00 pm – 5:30 pm		<p align="center">Redefining Cliff’s Investment Advice: The Practical Application of Financial Science <i>Ben Walker, Regional Director, Dimensional Fund Advisors</i></p> <p>This session examines the progression of academic research on the capital markets over the past 50 years and helps participants understand why their clients don't need an accurate prediction of the future to have a successful investing experience. Learn how DFA, one of the world's leading investment management firms, embraces and articulates the ACA philosophy of ignoring exogenous factors such as interest rates and P/E ratios in favor of focusing on endogenous factors such as financial planning, tax management and investor behavior.</p> <p align="right">Track E</p>
5:45 pm – 7:15 pm		<p align="center">Practice Management Happy Hour with Coach and Carla</p> <p>Come celebrate your successes and drown your sorrows as we expand the popular "Best Marketing Ideas" from previous conferences to include best practices in marketing, client communication, financial planning tools, maximizing the ACA System™, and other practice management topics. Whether you're clueless like Coach or a curmudgeon like Carla, come "where everybody knows your name" ready to share your best ideas and biggest bombs from the past year and learn from the rest of the ACA brain trust.</p> <p>Hors d'oeuvres will be served. Cash bar available.</p> <p align="right">Track C</p>

FRIDAY, October 22, 2010

7:00 am – 8:00 am	Breakfast			
8:30 am – 10:00 am	Exhibits Open	<table border="1"> <tr> <td data-bbox="412 1213 971 1738"> <p align="center">Exploring Cheer’s Top Shelf: UITs, Closed End Funds and Strategies for Portfolios <i>Featuring Jeff Augustine, John Heller and John Discepoli</i></p> <p>The first part of this session will help you understand and evaluate closed end funds and unit investment trusts. You will get answers to questions like these: Should you hold them? Should you sell them? What are the related tax consequences?</p> <p>The second part provides an exciting opportunity to hear from a CFA. Learn why he believes in passive management and his thoughts about portfolio construction strategies including when and how to use commodities and alternative asset classes in client portfolios.</p> <p align="right">Track E</p> </td> <td data-bbox="971 1213 1526 1738"> <p align="center">“What Keeps Your Clients like Norm Coming Back?” <i>with Rob Reed</i></p> <p>After a successful first year with a client, how do you communicate the value of renewing? What strategies and information can you supply that will help you retain your client? In addition, what types of meetings and content should you include in the sessions held during the renewal years?</p> <p align="right">Track B</p> </td> </tr> </table>	<p align="center">Exploring Cheer’s Top Shelf: UITs, Closed End Funds and Strategies for Portfolios <i>Featuring Jeff Augustine, John Heller and John Discepoli</i></p> <p>The first part of this session will help you understand and evaluate closed end funds and unit investment trusts. You will get answers to questions like these: Should you hold them? Should you sell them? What are the related tax consequences?</p> <p>The second part provides an exciting opportunity to hear from a CFA. Learn why he believes in passive management and his thoughts about portfolio construction strategies including when and how to use commodities and alternative asset classes in client portfolios.</p> <p align="right">Track E</p>	<p align="center">“What Keeps Your Clients like Norm Coming Back?” <i>with Rob Reed</i></p> <p>After a successful first year with a client, how do you communicate the value of renewing? What strategies and information can you supply that will help you retain your client? In addition, what types of meetings and content should you include in the sessions held during the renewal years?</p> <p align="right">Track B</p>
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10:00 am – 10:30 am	Morning Break with Sponsors			



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FRIDAY, October 22, 2010 cont.

10:30 am – 11:30 am	Exhibits Open	<p>Succession Planning: Belly Up to the Bar and Learn from Those Who've Been There</p> <p>A panel of ACA members share the strategies they have used for succession planning and what they have learned. You're sure to find something that wets your whistle. <i>Panelists TBA</i></p> <p style="text-align: right;">Track C</p>	<p>Who should inherit Sam's bar? What You Need to Know About Death and Taxes <i>with Tedd Oyler and Troy Thompson</i></p> <p>This session begins by addressing strategies for estate tax planning (including when to use ILITS, GRATS, and Family Limited Partnerships) and the tax implications of managing assets once a client has died. Before we're done, we'll also discuss the practical application of administering an estate, including when to bring in an attorney and how to fine-tune your client's own estate planning.</p> <p style="text-align: right;">Track E</p>
11:45 am – 1:15 pm		<p style="text-align: center;">LTCI-Protection For The Future Lunch & Learn Sponsored by MAGA</p> <p>Are you (and your clients) confused about whether you need to continue your private LTCI plans or take the new government program? Join this timely discussion about long-term care benefits under the CLASS Act provision of health-care reform.</p> <p style="text-align: right;">Track E</p>	<p>Lunch & Learn Sponsored by TBA</p>

FRIDAY, October 22, 2010 – SPECIAL EVENT (REGISTRATION AND ADDITIONAL FEE REQUIRED)

1:30 pm – 5:30 pm	<p style="text-align: center;">Workshop: Creating, Protecting and Realizing Your Practice Value</p> <p>David Goad of Succession Planning Consultants will lead this hands-on, action-oriented workshop designed to help every ACA member create, protect and realize their practice value. Whether you're just starting out or gearing up for retirement, you'll leave this workshop with an understanding of how to maximize your business value and a plan that will ultimately allow you to sell your practice without selling out your clients.</p> <p>Attendance at this workshop is limited to current ACA members only. Pre-conference preparation will be required.</p> <p>As a key piece of our 2010 Client-Centered Succession Planning initiative, ACA is pleased to offer this workshop for only \$79.</p> <p><i>The Advanced Planners Roundup registration fee includes attendance at this workshop. When you register for the Roundup you will be automatically registered for the workshop.</i></p>
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SATURDAY, October 23, 2010

7:00 am – 8:00 am	Breakfast	
8:15 am – 9:15 am	<p align="center">Everything Roth – What even Cliff didn't know about Roth IRAs. <i>Panelists TBA</i></p> <p>A panel discussion on tax and investment issues associated with Roth IRAs and Roth 401ks.</p> <ul style="list-style-type: none"> • How to determine which clients should take advantage of the two-year tax stretch-out for 2010 Roth conversions; • Other conversion strategies; • Advising clients regarding participation in Roth vs. traditional 401k and Roth vs. traditional IRAs; and • Investment and withdrawal strategies. <p align="right">Track E</p>	
9:30 am – 10:30 am	<p>Will you have any beer money in retirement? The Ins and Outs of Social Security</p> <p>A representative from the Arizona Social Security office discusses how to negotiate the maze of the Social Security Administration. Take a walk through the processes and timing for some of the less common programs such as repaying and restarting retirement benefits and applying and suspending benefits to permit a spouse to draw on the higher-earning spouse's record. Then discover who to turn to if your client gets incorrect information or a lack of cooperation from your local office.</p> <p align="right">Track E</p>	<p>What High Net Worth Clients (like May Day Malone) Want. <i>Featuring Rob Abbott, Frank Corrado, and Doug Taylor</i></p> <p>Advisors with high net worth clients talk about what their clients want and expect of them. Hot topics include: how to build your go-to list of allied professionals and work with them effectively, Is there a complexity ceiling? Address the needs of the family with 10M in assets who think they are in the middle class.</p> <p align="right">Track E</p>
10:30am – 11:00am	Morning Break with Sponsors	
11:00 am - 12:00 pm	<p align="center">Are You Listening? Developing Your Inner Dr. Fraser Crane.</p> <p>This session introduces innovative tools and techniques that advisors at all practice stages can use to improve their communication skills for more effective client relationships.</p> <p align="right">Track B</p>	
12:00pm – 1:30 pm	Lunch Break with Sponsors	
1:30 pm – 3:00 pm	<p>Women & Money: Working with Female Clients and how to deal with ones like Carla, Diane and Lilith <i>Featuring Jill Gianola, Linda Leitz and Kathleen Rehl,</i></p> <p>Panel discussion on women's issues in financial planning such as becoming a widow, going through divorce and being independent/solo. The presenters also discuss how to ensure that the woman in client heterosexual couples is included, heard, educated, and engaged in the financial planning process.</p> <p align="right">Track B</p>	
3:00 pm – 3:30 pm	Afternoon Break ~ Final Break with Sponsors	
3:30 pm – 4:30 pm	<p align="center">Last Call/The Morning After</p> <p>Cathy Stegmaier, ACA executive director, answers the question "Is ACA still relevant to my practice?" Don't leave without this look back at ACA in 2010 and a look forward to 2011.</p> <p align="right">Track D</p>	
4:30 pm – 4:45 pm	<p align="center"><u>Conference Close ~ Cheers!</u></p>	

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5:30 pm – 6:30 pm	<p>Final/Final: ACA Succession Speed Dating, or Bringing Together Continuity Partners and Sellers and Buyers</p> <p>Just when you thought the conference was over. . .</p> <ul style="list-style-type: none"> • Are you looking for a continuity partner to ensure your practice doesn't just disappear if you suddenly become sick or disabled or you die? • Are you interested in building your practice by acquiring clients from other ACA members but don't know who might have clients to sell? • Were you inspired by the Friday workshop and ready to identify some possible buyers for your practice? <p>If you're tired of looking for "succession planning love" in all the wrong places, join us for a fun, fast-paced hour where you might just find "the one."</p> <p>There is no charge to participate in this event.</p>
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SATURDAY, October 23 - SUNDAY, October 24 - SPECIAL EVENTS (REGISTRATION & ADDITIONAL FEE REQUIRED)

ADVANCED PLANNERS ROUNDUP	ACA POWER TOOLS REVIEW
<p>Spend some quality time with your fellow ACA advanced planners (Practice Matrix Level 3 and higher).</p> <p><u>SCHEDULE:</u> Friday, October 22, 1:30 to 5:30 pm: Creating, Protecting and Realizing Practice Value workshop with David Goad of Succession Planning Consultants.</p> <p>Saturday, October 23, 6:30 to 10:00 pm: Dinner and full group discussion.</p> <p>Sunday, October 24, 7:00 to 10:00 am: Breakfast and small group discussion.</p> <p>This time is all about you and your needs. It is designed to deliver maximum value and then get you back home.</p>	<p style="text-align: center;"><i>Refresh your knowledge of the ACA System™.</i></p> <p>Here's your chance to review the powerful systems, core tools and marketing help available only to ACA members. We'll follow a case study client through the initial year of an open retainer. And we'll review, step by step, the use of ACA core tools and documents, plus the thought process behind each recommendation.</p> <p><u>SCHEDULE:</u> Saturday, October 23, 7 to 9 pm: "Everything Marketing." A review of the marketing resources available to you as an ACA member.</p> <p>Sunday, October 24, 7am to 6 pm: "Everything Else." We'll start with breakfast at 7 am, then jump into our case study and finish at 6 pm. Lunch will be provided.</p>
<p>REGISTRATION FEE: \$139, which includes the \$79 fee for the Friday afternoon workshop</p>	<p>REGISTRATION FEE: \$169</p>



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SCOTTSDALE MAP



RESORT MEETING ROOMS & MAP

