What Participants Have Said!

I hope this event was as beneficial for the Foundation as it was for me personally. They graciously opened their office and no stone was left unturned. As I transition from my previous professional experiences into financial planning, I believe the practical insight that I gained will be of benefit to myself and the community that I hope to serve. **J.A.**

This Be Our Guest session was one of the most enlightening and rewarding times I have ever spent. **R.K.**

I found the session one of the best meetings I have attended in a longtime. What made it so great was these guys are real people with the same issues we have on a day to day basis. The best part is they were open and honest on how they are dealing with everything. I learned a lot about growing my business. **J.H.**

I was pleasantly surprised at the scope of information that was shared. As well as access to all facets of their business model, personal insights and employee access. **R.A**

Thank you – fabulous program – looking forward to participating in the future! **J.R.**

Challenging Times call for Challenging Solutions!
Visit a top planner's office to learn from their success.

When you read the financial planning publications, there are certain financial planners who are consistently interviewed. They are also the same planners speaking at national conferences and being quoted in consumer magazines and newspapers. They are passionate about our profession, committed to its growth and supportive of their peers, particularly in these challenging times.

Some of these planners have volunteered to open their offices to other planners for a day as part of a fund raising initiative to benefit the Foundation for Financial Planning.

The ***Be Our Guest*** program is an extraordinary opportunity to learn more about how leading financial planners are succeeding in these challenging times. Topics shared include:

Firm history	**Wealth Management Approach**	**Client Communication**
Investment Philosophy	**Employee Relations**	**Marketing Strategies**
Management Structure	**Client Processes and Services**	

You will share this experience with a few other likeminded practitioners and have the opportunity to share an intimate, on site "brain dump" with these successful planners for an entire day. The cost to attend is a $1,000 contribution to the Foundation for Financial Planning.

2010 Schedule

March 11 – Norm Boone, MBA, CFP® – San Francisco, CA

Mosaic Financial Partners is a leading provider of fee-only financial planning and investment management services to corporate executives, professionals and business owners. The firm provides an integrated approach to financial planning and investment management. The 16 staff, (8 CFPs, 2 CFA's a CPA and a certified coach) in two offices are widely recognized for their quality and expertise. The firm has offices in San Francisco and Lafayette, California. The website is http://www.mosaicfp.com

May 10 – Cheryl Holland, CFP® - Columbia, SC

Cheryl has been in financial planning for over 20 years and is a winner of a Schwab Impact Award. The Abacus Planning Group, Inc. is a fee-only comprehensive wealth management firm providing advice primarily to closely held business owners, professionals and widows focused on creation and preservation of wealth. They have $525,000,000 assets under management. The firm has 13 employees who handle 155 clients. The website is www.abacusplanninggroup.com

July 19 - Bill E. Carter, CFP®, CLU, ChFC - Dallas, TX

Carter Financial Management offers more than 30 years of insight, expertise and financial counsel for business owners, executives and their families. Bill Carter, CFP®, ChFC, CLU, a well-respected pioneer in the financial planning profession, founded the firm in 1976. CFM offers personalized, comprehensive financial plans specifically tailored to each client. The principals have a combined 189 years of experience; the firm, itself, has 16 Certified Financial Planners™ on staff. The website is www.cascfm.com

Watch for dates for upcoming sessions with these planners.

Elissa Buie, CFP® / David Yeske CFP® – San Francisco, CA
Glenn Kautt, CFP® - McLean, VA
Fall 2010 - Marc Freedman, CFP® – Peabody, MA

Be Our Guest Registration

Please send your $1,000 contribution to the Foundation for Financial Planning, specifying the session(s) you want to attend. Reservations are first come, first serve and are non-refundable. Sessions are all day with lunch provided.

Yes, I want to make an investment in myself. Please register me for the following ***Be Our Guest*** session:

(Check all sessions that you wish to attend)

__ **March 11** – Norm Boone, MBA, CFP® – San Francisco, CA

__ **May 10** – Cheryl Holland, CFP® - Columbia, SC

__ **July 19** – Bill Carter, CFP®, CLU, ChFC – Dallas, TX

Enclosed is my contribution for $1,000 per session. All reservations are first come, first serve and contributions are non-refundable.

Amount enclosed: $____________

Please charge my contribution of $__________ to my credit card.

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Email: mail@foundation-finplan.org