



FINANCIAL  
PLANNING  
ASSOCIATION

The Future of the Profession - *Together*

REGISTRATION

FPA Members & Non Members : Free!



YOU ARE INVITED!  
**NEXGEN SoCal Summit**

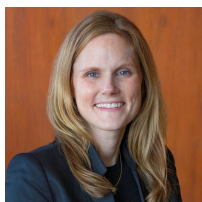
Please join the FPA NexGen chapters from Los Angeles, Orange County, and San Diego for our annual SoCal Summit!

THURSDAYS - 3 WEEKS, 3 DIGITAL SESSIONS : 11/4, 11/11, 11/18

WEEK **1**

**FINDING YOUR ROLE IN ESTATE PLANNING – How to Add Value Through Wealth Strategy Guidance**

Financial professionals who want to grow their practices or deepen engagement with existing clients are increasingly looking for ways to differentiate service offerings beyond investment management. Wealth strategy guidance – such as tax and estate planning, family governance & charitable planning – can be an important driver of practice growth. Hear how to work in the estate planning process, and the important roles advisors can play.



**LESLIE GELLER**

>> **REGISTER NOW!**

LOS ANGELES  
SAN DIEGO  
ORANGE COUNTY

YEAR-END TAX PLANNING WEEK **2**

Reviewing a client's tax return and understanding their full financial picture adds massive value to clients. This conversation will cover a lot of ground on the tax front, to help you as a financial planner prepare for year-end tax planning conversations.



**JODI SELLECK, CFP®, EA**

ADVICE ON MUTUAL FUND SELECTION WEEK **3**

Is it really true that actively managed funds underperform passively managed funds? Are expense ratios all that matter in mutual fund selection? What role, if any, should past performance and Morningstar's new forward-looking ratings play in selecting mutual funds for your clients? We will address these questions and more so that you can deliver sound evidence-based advice to your clients on mutual funds.



**DAVID NANIGIAN,**  
Ph.D., CFP®,  
Dr. Thomas  
Warschauer  
Endowed  
Professor of  
Finance at  
San Diego State  
University

**JOIN US!**

📅 NOV 4, 2021 ⌚ 12:00 PM

📍 ZOOM

dtassone@kayecapital.com

NEXGEN / LOS ANGELES

📅 NOV. 11, 2021 ⌚ 7:30 AM

📍 ZOOM

Leslie.Rea@TNLPG.com

NEXGEN / ORANGE COUNTY

📅 NOV. 18, 2021 ⌚ 12:00 PM

📍 ZOOM

Amie.agamata@nm.com

NEXGEN / SAN DIEGO