## WE'RE GETTING CLOSE - FINANCIAL PLANNING WEEK - OCTOBER 2008

*Financial Planning Week* is next month and The FPA – East Bay, in collaboration with Oakland's 16th District Assembly member; Sandré Swanson will be hosting a Financial Planning Clinic to kick off the Week. We are also happy to note that the Mayor of Oakland and other elected officials throughout the bay area have expressed interest in supporting our efforts. The Clinic will be held on Saturday, October 4 from 10:00 AM – 4:00 PM at Oakland's City Hall Building.

Our goal is to foster greater financial literacy and highlight the value of financial planning without marketing specific products. At the Financial Planning Clinic, volunteer planners ("volunteers") will be available to speak one-on-one with members of the public about their financial questions and concerns.

So far we have thirty-five financial professionals who have signed up as volunteers, but we can use more. We have also asked the *California Society of CPAs* to join our efforts, and they have agreed to provide volunteer support during the event.

Volunteers will be seated at tables designated for specific financial planning topics, allowing attendees to choose a topic they are interested in with a volunteer ready to discuss that topic. Volunteers will have the opportunity to assist many attendees throughout the event, but will speak to only one individual or one individual family at a time. In addition to meeting with volunteers, attendees will also be able to attend Educational Workshops on diverse and popular financial topics presented by leading experts in personal finance who may or may not hold the CFP® certification. Volunteers will be divided for one-on-one consultations along their areas of expertise in accordance with these seven topics:

General Financial Planning (education funding, debt management, mortgage, loans, special circumstances)
Retirement Planning (pension, 401(k), IRA, Roth IRA, Social Security)
Investment Planning (stocks, bonds, mutual funds, real estate, investment strategies)
Income Tax Planning (filing, deductions, contributions, small business planning)
Estate Planning (wills, trusts, gifting, estate taxes)
Insurance Planning (life, health, disability, long-term care, property & casualty)
Employee Benefits (medical, disability, stock option plans)

As the date draws close, we will be sharing additional information and getting the word out to surrounding bay area cities and counties. Volunteers will not be permitted to hand out business cards or attempt to sell any products or services at the Financial Planning Clinic, but each volunteer's name and contact information will be included in the Financial Planning Resource Booklet that attendees will receive as they enter the Clinic. Volunteers will receive a briefing before the Clinic begins to provide them with an overview of the Clinic layout and rules, a schedule for the lunch break, and an opportunity to ask questions.

If you are interested in participating in what will proved to be an extraordinary event, please send an email to *ClientServices@pfwealthgroup.com* and include your contact information and the area of expertise you would like to address during the clinic. Also note if you are interested in being one of the keynote or workshop speakers.