



Date: **Wednesday, September 1, 2010**  
Location: **Round Hill Country Club - Alamo, CA**  
Time: **7:15 AM**  
Topic: **“What a Ride: Lessons I’ve Learned in My Business”**  
Panelists: **Marilyn Plum, CFP®, Bob Enright, CFP®, Chris McClure, CFP®**  
Moderator: **Eric Flett**

**Three successful, veteran East Bay advisors will share their insight and best practices at the upcoming September meeting. You will hear what they’ve done to navigate through the rough conditions over the past decade, what is working today, and how they are positioned for the future. They will discuss their investment process, technology tools, office organization, practice management processes and succession plans.**

***Meeting Sponsored By:***

***Ed McElroy  
Wells Fargo Private Bank  
(925) 708-4672***

***2010 Gold Sponsor of the East Bay Chapter***

Member Name \_\_\_\_\_

Guest Name \_\_\_\_\_

*Reservations and cancellations must be received by Monday, August 30, 2010  
by noon to be assured of a breakfast or refund, respectively.*

**Advance Registration: \$25 per member \$35 per guest**  
**At the Door (reservation still needed): \$35 per member; \$45 per guest**

To pay by credit card, go to <https://www.123signup.com/register?id=mppgn>

To pay by check, send to: **FPA – East Bay  
1485 Treat Boulevard, Suite 202B  
Walnut Creek, CA 94597**