



FINANCIAL PLANNING ASSOCIATION OF THE EAST BAY

Date: **Wednesday, September 3, 2008**
Location: **Round Hill Country Club - Alamo, CA**
Time: **7:15 AM**
Topic: **Integrating Technological Solutions**
Speaker: **Greg Friedman, MS, CFP®**

As the Financial Planning Industry continues to grow, the use of technology becomes more essential for successful practices. It's very important to understand the changing landscape of the different software that can help grow your practice and streamline your business. There had been one leader of the CRM movement over the past decade that has brought together the technology community with the financial planning community. Greg Friedman who is the founder and President of Friedman & Associates has taken a leadership role in co-founding Your Silver Bullet, LLC, a community of over 25 independent software providers whose mission is to accelerate development of integrations among common CRM, financial planning and portfolio and investment management applications. Greg will discuss the changing landscape in the CRM world as well as touch on all aspects of the growing field of technological solutions for Financial Planners.

Meeting Sponsored By:
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Financial Planning Association of the East Bay

Member Name _____

Guest Name _____

Reservations and cancellations must be received by Monday, September 1st, 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 <http://www.123signup.com/calendar?org=FPAEastBay>

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