

Draft Agenda

Friday, September 5, 2008

9:00 AM	Continental Breakfast	All
9:30 AM	Welcome & Introductions - Meeting Called to Order Appointment of Secretary Approval of Minutes - May 1&2, 2008 Meeting Chair's Report - Opening Remarks	Leonard Wright
9:45 AM	CalCPA Pod cast and article content discussion	Leonard Wright/ Bill Spaniel
10:30 AM	Strategic Alliance Task Force Report	Angie Grainger
10:45 AM	BREAK	
11:00 AM	AICPA 2009 PFP Conference Update/California Only Session	Karen Goodfriend/ Mike Trank
11:30 AM	2009 California Education Foundation PFP Conference	Rob Healy
11:45 AM	CalCPA Financial Literacy Report	Angie Grainger
12:00 PM	LUNCH	
1:15 PM	Chapter Outreach/Roundtable	Lynette Atchley/ PFP Chapter Chairs
1:45 PM	Financial Planning Best Practices - Roundtable	Dan Thomas
2:15 PM	Leg/Reg Report - January 21 CPA Day at the Capitol	Jerry Sample
2:25 PM	NAPFA and FPA Update	Rob Healy
2:35 PM	AICPA Update: PFP Executive Committee/Changes to ADV Form	Liz Flores
2:55 PM	AICPA Update: PFS Credential Committee	Karen Goodfriend
3:05 PM	AICPA Update: CICA Prime Plus/ElderCare Task Force Jump\$tart Coalition Report/AICPA PFS Networking	Mitch Freedman
3:15 PM	Future meetings Information	Vince Chin
3:30 PM	ADJOURN	