

**"Designed
for the Profession
by the Profession"**

**May 27, 2010
Thursday**

8:25 a.m. - 4:45 p.m.

**Sheraton Hotel at the
Convention Center**

6100 College Boulevard
(913) 234-2100

KSCPA Members: \$200
Registration Fee: \$250
Add \$20 after May 13th

8 hours CPE Credit

CFP and Life/Health Insurance
Credits Pending

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Also of interest...

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The Kansas Society of
Certified Public
Accountants, Inc.

P. O. Box 4291
Topeka, KS 66604-0291

(785) 272 4366 Phone
(785) 272-4468 Fax

Personal Financial Planning Workshop

- 8:05 Registration
- 8:25 Opening remarks
Gerald Steffes, CPA/PFS, CFP®, Task Force Chair
- 8:30 **Estate Planning Update**
Jerry Bell, Attorney at Law
- 9:30 **Roth IRA Conversions and IRA Distribution Rules**
Tim Shmidl, CFP®, CFS, CRPC, Prism Financial Group, LLC
- 10:30 Break
- 10:45 **How to Counsel Clients on Marketing and PR Strategies**
Marie Swift, Impact Communications, Inc.
- Noon Lunch
- 1:00 **Morningstar Investment Analysis**
Carl Barber, CPA, CFP®, Creating Abundance, Inc.
- 2:00 **Property and Causality Insurance Overview**
John Weber, Farm Bureau Insurance
- 2:30 **Economic Update: Understanding Bull and Bear Market Trends**
Gerald Steffes, CPA/PFS, CFP®
- 3:30 Break
- 3:45 **Financial Planning Q&A Session**
- 4:45 Adjourn



Register today!