

# Academy of Financial Services Annual Meeting

October 3-4  
Boston Convention and Exhibition Center  
Boston, Mass.

Presented in conjunction with



BOSTON  
2008

October 4-7  
Boston Convention and Exhibition Center  
Boston, Mass.

The Annual Conference of the Financial Planning Community

[www.FPAAnnualConference.org](http://www.FPAAnnualConference.org)

## Registrant Information

If mailing form, save time and staple your business card here!  
Please print clearly to minimize badge errors.

Full Name _____		Professional Designations _____	
Name for Badge _____			
Company/Organization/Institution Name _____			
Address 1 _____			
Address 2 _____			
City _____	State/Province _____	ZIP/Post Code _____	Country _____
E-mail _____			
Phone _____	Fax _____		

## Special Events at FPA Boston 2008

Companions are welcome to participate in all special events;  
however, a ticket for each companion for each event must be purchased.  
Participants must be at least 16 years old.

Event details available online at [www.FPAAnnualConference.org](http://www.FPAAnnualConference.org).

**FPA Boston 2008 Celebration at Jillian's of Boston**  
**Monday, October 6**  **YES! I will attend**  
6:30 p.m. – 11:00 p.m. Free to FPA Boston 2008 full-conference registrants.  
*Ticket required; Space is limited.* Additional guests:  
\$185 per additional guest x \_\_\_\_\_ (# of attendees)

**Total Special Events \$ \_\_\_\_\_**

## Companion Events

All activities require a minimum of participants. Participants must be at least 16 years old.  
Event details available online at [www.FPAAnnualConference.org](http://www.FPAAnnualConference.org).

Companion Badge Name(s) \_\_\_\_\_

**On the Trail Through Cambridge**  
**Saturday, October 4** \$80 x \_\_\_\_\_ (# of tickets)  
9:15 a.m. – 2:00 p.m.

**Boston by Bike**  
**Saturday, October 4** \$90 x \_\_\_\_\_ (# of tickets)  
9:30 a.m. – 1:00 p.m.

**Bewitching Seaports: Salem and Marblehead**  
**Sunday, October 5** \$125 x \_\_\_\_\_ (# of tickets)  
9:00 a.m. – 4:30 p.m.

**"La Dolce Vita" North End Culinary Tour**  
**Monday, October 6** \$105 x \_\_\_\_\_ (# of tickets)  
10:00 a.m. – 1:45 p.m.

**Total Companion Events \$ \_\_\_\_\_**

## Registration Fees

All fees are in U.S. dollars.

- AFS Annual Meeting** ..... **\$255**  
Includes AFS Annual Meeting registration and AFS membership for one year (\$180 registration + \$75 membership), plus admittance to FPA Boston 2008 on Saturday, October 4 (opening general session, exhibit hall and evening reception).
- AFS Annual Meeting + 1-Day FPA Boston 2008\*** ..... **\$355**  
Includes AFS Annual Meeting registration and AFS membership for one year (\$180 registration + \$75 membership), plus admittance to FPA Boston 2008 on Saturday, October 4, and Sunday, October 5. See FPA Boston 2008 Web site for schedule details.
- AFS Annual Meeting + Full FPA Boston 2008\*** ..... **\$525**  
Includes AFS Annual Meeting registration and AFS membership for one year (\$180 registration + \$75 membership), plus full admittance to FPA Boston 2008 through Tuesday, October 7. See FPA Boston 2008 Web site for schedule details.
- AFS Annual Meeting — Student Rate** ..... **\$80**  
Includes AFS Annual Meeting registration and one-year subscription to AFS Journal, plus admittance to FPA Boston 2008 on Saturday, October 4 (opening general session, exhibit hall and evening reception). Full FPA Boston 2008 attendance is available at the student rate of \$350; visit [www.FPAAnnualConference.org](http://www.FPAAnnualConference.org) for details.

\*REQUIRED CRITERIA FOR SPECIAL AFS MEMBER PRICING TO FPA BOSTON 2008:  
AFS 2007 Membership or AFS 2008 Meeting Participation: paper presentation, tutorial provider or panel member.

**Total Registration \$ \_\_\_\_\_**

## Optional FPA Boston 2008 Programming Registration

Space is limited; registration is required.  
All fees are in U.S. dollars. Member prices are in **BOLD**.

	Early-bird Rate Deadline: August 15	Full Rate August 16-October 7
<b>Business Succession Toolbox: The Nuts and Bolts of Structuring, Valuing and Funding Business Transitions</b> <b>Saturday, October 4</b>		
<input type="checkbox"/> Half-Day Workshop (Afternoon Only)	\$125 / \$150	<b>\$145 / \$185</b>
<b>Advanced Investment Strategies and Alternative Investments</b> <i>Powered by Investment Management Consultants Association (IMCA) in collaboration with The Wharton School at the University of Pennsylvania.</i> <b>Saturday, October 4</b>		
<input type="checkbox"/> Half-Day Workshop (Afternoon Only)	\$125 / \$150	<b>\$145 / \$185</b>
<b>Leading the Profession: A New Code of Ethics for CFP® Professionals</b> <b>Saturday, October 4</b>		
<input type="checkbox"/> Half-Day Afternoon Symposium	\$125 / \$150	<b>\$145 / \$150</b>
<b>FPA Press Author Symposium</b> <b>Saturday, October 4</b>		
<input type="checkbox"/> Half-Day Afternoon Symposium	Free	Free
<b>Diversity Summit</b> <b>Saturday, October 4</b>		
<input type="checkbox"/> Half-Day Afternoon Summit	Free	Free
<b>The Soul of Leadership and Its Impact on Teamwork</b> <b>Sunday, October 5</b>		
<input type="checkbox"/> Mid-conference Workshop	Free	Free

**Total Optional Programming \$ \_\_\_\_\_**

## FPA Boston 2008 Multimedia CD-ROM

Purchase the complete conference multimedia CD-ROM (includes general and educational sessions audio and PowerPoint presentations) before FPA Boston 2008 and save \$200 off the onsite price.

- \$395** (FPA Member)
- \$495** (Nonmember)

**Total Recordings \$ \_\_\_\_\_**

### FPA Boston 2008 Registrant Information

*Please help us collect accurate attendee demographics by answering the following questions.  
This information is not required to process your registration; please answer as applicable.*

What aspect of FPA Boston 2008 motivated you to register? *Check all that apply.*

- Educational Program     CE Credits     I'm a past attendee     Networking     Destination     Community  
 Exhibit Hall     Chapter     Other \_\_\_\_\_

Which of the following products do you recommend for your clients? *Check all that apply*

- Annuities     Cable/communications     Equipment Leasing     Insurance     Load Funds  
 No-load funds     Oil & Gas     Real Estate     Stocks/Bonds     Tangibles

By what type of firm are you employed?

- Academic Institution     Independent RIA     Independent Broker-Dealer     RIA Affiliated Broker-Dealer  
 Regional/Local Brokerage     National Wirehouse     Insurance Company     Bank  
 Law Firm     Accounting Firm     Consulting     Other \_\_\_\_\_

Will you be applying for state insurance CE credit for applicable sessions? (Required for processing)     Yes     No

State in which you are licensed: \_\_\_\_\_

*Note: at this time, FPA can only accommodate reporting for one state per attendee.*

The states to which FPA is applying for state CE credit:

Arizona, California, Colorado, Connecticut, Delaware, Dist. of Columbia, Florida, Georgia, Illinois, Indiana, Iowa, Kansas, Kentucky, Maryland, Massachusetts, Michigan, Minnesota, Missouri, New Hampshire, New Jersey, North Carolina, Ohio, Oregon, Pennsylvania, Rhode Island, Texas, Utah, Vermont, Virginia, Washington, Wisconsin

Name as it appears on your insurance license: \_\_\_\_\_

License number as it appears on your license: \_\_\_\_\_

NPN Number (as assigned by NAIC): \_\_\_\_\_

### Conditions and Payment

<b>Basic Registration</b>	\$ _____
<b>Optional Programming</b>	\$ _____
<b>Multimedia CD-ROM</b>	\$ _____
<b>Special Events</b>	\$ _____
<b>Companion Programs</b>	\$ _____
<b>GRAND TOTAL</b>	\$ _____

- Check enclosed (payable to FPA)     American Express     Visa     MasterCard     Discover

Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

By my signature above, I hereby authorize FPA to debit my credit card for the total amount. I have read and understand the cancellation/refund policy of this registration agreement.  
Dues, contributions or gifts to FPA are not tax deductible as charitable contributions for federal income tax purposes but may be deductible as a business expense.

- SPECIAL SERVICES.** Please check here if you have a disability or require special assistance. Attach a written description of your needs.  
 Please check here if you do not wish to have your photograph used in FPA promotional materials.  
 Please check here if you do not wish to have your name listed on the conference attendee roster.

### Submit Registration Form

<b>Mail:</b>	<b>Call:</b>	<b>Fax:</b>
Financial Planning Association	800.322.4237 (U.S./Canada)	303.759.0749
Suite 400, 4100 E. Mississippi Ave.	303.759.4900 (International)	
Denver, CO 80246		

**Additional Information Available Online:  
[www.FPAAnnualConference.org](http://www.FPAAnnualConference.org)**

The FPA Boston 2008 program is under continuing development and this registration form may not include the most current updates.  
Check the Web site for updates and additions to program and schedule, pre-conference workshops, networking activities, companion programs and additional learning resources.

#### CANCELLATION / REFUND POLICY

Cancellations must be made in writing. All refunds are based on U.S. postmarked date of written request. Cancellations marked on or before September 12, 2008, to receive full refund, less \$100 processing fee; \$25 processing fee applies to companion program and special evening networking events. **No refunds will be given after September 12, 2008.**