

## FPA CHAPTER MEETING - WEDNESDAY, JULY 8, 2009!

**Time:** 5:30 - 6:00 PM—Registration and Networking ♦ 6:00 - 8:00 PM—Dinner & Seminar

**Location:** Hurricane 100 Room, UM's BankUnited Center, 1245 Dauer Drive, Coral Gables

**Cost:** *In Advance:* Members: \$45; Non-Members: \$55 / *At the Door:* Members: \$55; Non-Members: \$70

### FIDUCIARY LAW: GOOD PROCESS, BAD PROCESS OR NO PROCESS?

**Presented by Frank Armstrong, CFP®, AIFA® ♦ President and Founder, Investor Solutions, Inc.**

Frank Armstrong will discuss the process of fiduciary law, including who is a fiduciary and what a fiduciary is required to do under the relevant rules and laws that govern the position. He will provide an update on the new, broader requirements of investment fiduciaries and the expanded notion of the "prudent investor" rules. The session will discuss how the development in financial sciences has changed the scope of fiduciary compliance and will introduce attendees to a proscribed process that incorporates all legal references associated with prudent fiduciary stewardship.

### TRANSITION ISSUES OR TAX STATUS HOKEY POKEY: YOU PUT YOUR TAX STATUS IN, YOU TAKE YOUR TAX STATUS OUT...SO WHAT HAPPENS WITH THE TAXMAN?

**Presented by Carlos F. Arazoza, JD, CPA ♦ Arazoza & Fernandez-Fraga, P.A., Arazoza & Company, P.A.**

There are significant tax implications when a person's tax status changes from Non-Resident Alien (NRA) to Resident Alien (RA). Further, as of last summer there is now a new tax that applies to citizens and long term residents that expatriate. Carlos Arazoza will discuss the definitions involved and the tax impacts of changing status, whether inbound or out bound.

**Accepted for 2 hours of insurance and CFP CE.**

**To register, please forward payment by credit card or check by 5:00 PM, Monday, July 6, 2009.**

**Fax form below with credit card information to: 305-470-7487**

OR

**Mail form below with check to: FPA of Miami-Dade, P.O. Box 560982, Miami, FL 33256-0982**

*Payment must be received prior to meeting or guaranteed with a credit card.*

*Cancellations received 48 hours prior to the meeting will receive a full refund. "No-shows" will be invoiced.*

Please charge my  MasterCard  Visa  Amex or  I will send a check (**must be received by 7/6/09**)

Credit Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_ Amount \_\_\_\_\_ (*Members: \$45; Non-Members: \$55*)

Name \_\_\_\_\_

Company \_\_\_\_\_

Company Address, City, State, Zip \_\_\_\_\_

Credit Card Billing Address, City, State, Zip (if different from above) \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

CFP Board ID # \_\_\_\_\_ Member \_\_\_\_\_ Non-Member \_\_\_\_\_

E-mail \_\_\_\_\_

By my signature below, I hereby authorize FPA of Miami-Dade to debit my credit card for the total amount. I have read and understand the cancellation/refund policy of this registration agreement.

Date \_\_\_\_\_ Signature \_\_\_\_\_

**Questions? Call 786-390-7655 or e-mail: [info@FPAMiamiDade.org](mailto:info@FPAMiamiDade.org)**