



# Financial Planning Week

## October 2 – 8, 2011

### Celebrate by participating in events across the county.

October 1, 2011

#### Letter from the President of the Financial Planning Association of San Diego.

Dear fellow San Diegans,

Our hard-earned money is what feeds, clothes and shelters our families and pays for the other necessities of life. What we can manage to save and invest is what pays for our dreams—college for our children, a comfortable and dignified retirement, gifts to worthwhile charities and bequests to the next generation. To pay for these needs and realize these dreams takes wise planning and solid advice, which our members are dedicated to providing.

As members of the non-profit Financial Planning Association (FPA) of San Diego, our mission is to improve financial literacy and provide sound financial education in our communities, helping to foster the happiness, well being and success of our neighbors and citizens.

This year, Financial Planning Week—a nationwide event running October 2 – 8, 2011—culminates in San Diego with our first ever *Financial Planning Day*, taking place on Saturday the 8th at the Jacobs Center on Euclid Avenue. Open from 10:00 a.m. to 3:00 p.m., this completely FREE, no strings attached event is open to all San Diego city and county residents.

Partnering with prominent community leaders, including the City of San Diego, Mayor Sanders and City Council President Young, FPA members and CERTIFIED FINANCIAL PLANNERS® will be on hand to provide free one-on-one financial counseling to all attendees, as well as a number of workshops throughout the day covering topics such as Foreclosure Prevention, Avoiding Scams and Fraud and Improving Your Credit Score...among others. Free online registration, as well as the day's full agenda, for the *San Diego Financial Planning Day* is available at [www.FinancialPlanningDays.org/SanDiego](http://www.FinancialPlanningDays.org/SanDiego) or by calling 877-861-7826. Walk-ins are also welcome!

Plan to join us on Saturday, October 8th, and take the first step toward putting yourself and your family on the path to establishing financial security and realizing your dreams.

Hope to see you there,

**Judy C. Hagar, CFP**

President  
San Diego Financial Planning Association  
[info@fpasandiego.org](mailto:info@fpasandiego.org)  
[www.financialplanningweek.org](http://www.financialplanningweek.org)



Financial Planning Week

October 2 – 8, 2011

Schedule of Events:

• **Monday, October 3rd, 7-8:30 p.m.**

"Pay Less For College: Strategies to Reduce Your Family's College Expenses"

Deborah Fox and Rick Brooks, CFP  
Scripps Cottage at SDSU, 5500 Campanile Drive (parking on Level 8 of PS4)

• **Wednesday, October 5th, 6-8 p.m.**

Consumer Financial Planning Hotline  
Free financial consultations with a local CERTIFIED FINANCIAL PLANNER®

Call (619) 293-2700 — The San Diego Union Tribune

• **Saturday, October 8th, 10 a.m. - 3 p.m.**

San Diego's Financial Planning Day – opening remarks from KUSI news anchor Tom Jordan  
Full day of completely free, one-on-one financial counseling, workshops and presentations for San Diego residents Joe & Vi Jacobs Center, 404 Euclid Avenue, San Diego

Visit [www.FinancialPlanningDays.org/SanDiego](http://www.FinancialPlanningDays.org/SanDiego) for more information or to register in advance.



Ready or not,  
the future  
is coming.  
**BE READY.**

**Mayor Jerry Sanders** and  
the **City of San Diego** Invite you

**Saturday, October 8, 2011~ 10am - 3pm**  
**Joe & Vi Jacobs Center**  
404 Euclid Avenue, San Diego

#### San Diego Financial Planning Day

Free one-on-one personalized financial advice. Free financial workshops. No strings attached.  
In today's uncertain economy, planning for your financial future is more important than ever. Don't miss this opportunity for a free, private consultation on financial issues that matter to you with experts from the Financial Planning Association and highly qualified CERTIFIED FINANCIAL PLANNER professionals.  
In addition to one-on-one consultations, there will be workshops on a variety of financial topics throughout the day. Stay as little or as long as you'd like. It's all free. Bring a friend!

#### Topics

Budgeting • Credit and debt • Investing • Retirement • Taxes • Homeownership • Estate planning • Insurance • Employee benefits • Education savings • Small business  
And many more!

REGISTER TODAY FOR FREE AT

[www.FinancialPlanningDays.org/SanDiego](http://www.FinancialPlanningDays.org/SanDiego)  
**1.877.861.7826**

#### Need HELP with a financial issue and don't know where to turn?



In cooperation with the San Diego Union Tribune, The Financial Planning Association of San Diego, a non-profit organization, is pleased to offer FREE financial consultation to San Diegans on October 5th from 6-8pm.

Certified Financial Planners will be waiting to take your call and answer any questions you may have about issues that affect your financial life.

This is a public service offered by FPA San Diego during Financial Planning Week to raise the awareness of the importance of financial planning and to help you.

#### Financial Issues You Might Like to Address When Calling:

- Debt Management
- Retirement, College Planning and "Rainy Day" Savings
- Financial Preparation for Buying a House
- Planning for Your Parents Long Term Care, Trusts, etc.
- Strategies for Improving Your Finances
- Investments: Stocks, bonds, funds, 401k, etc.
- Estate Planning
- Real Estate Matters
- Insurance: Home, Life, Disability

**Personal Finance Hotline! (619) 293-2700 Wed., Oct. 7, 6-8 p.m.**

FPA  
FINANCIAL PLANNING ASSOCIATION  
OF SAN DIEGO  
The Heart of Financial Planning™

The Financial Planning Association is the membership organization for the financial planning community. Its members are dedicated to supporting the financial planning process in order to help people achieve their goals and dreams. FPA believes that everyone needs objective advice to make smart financial decisions and that when seeking the advice of a financial planner, the planner should be a Certified Financial Planner, CFP® Details about FPA San Diego can be found at [www.FPAsanDiego.org](http://www.FPAsanDiego.org) or by calling (619) 504-0142.