Financial Planning Forum Member Newsletter

May 2007

In This Issue

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Register For May 22 Meeting On-Line (Click Here)

President's Message

May marks the conclusion of the '06-07 program year for the Financial Planning Forum. This month's program will focus on the real estate market, a topic of much interest. Get the latest update on the market, answers to questions about the "real estate bubble", and the impact of the recent melt-down in the sub-prime mortgage market.

Dr. Elizabeth Landsverk, our speaker in April, provided insights into the challenges of assessing competency in elderly patients. She covered a variety of topics associated with aging clients including medical, legal, familial, and financial issues. Utilizing case studies, she was able to illustrate the degree of difficulty and complexity associated with such pronouncements.

If you are seeking additional resources Dr. Landsverk recommended the assistance of APS, Adult Protective Services http://www.cdss.ca.gov/cdssweb/AdultProte_175.htm

Greater Bay Trust Company Hosts Member Reception Prior to May Meeting

Special thanks to Greater Bay Trust Company for stepping forward to sponsor a reception to celebrate the conclusion of another successful year for the Financial Planning Forum. Join us for a time of networking with hosted beverages and appetizers. The fun begins at 5:00 P.M. in the courtyard.

Bring a business card for entry into a raffle for 4 seats to an upcoming Giants baseball game, courtesy of Greater Bay Trust Company.

2006-2007 Program

September 26, 2006
Daniel Egan, Bernstein Investment Research
Capital Markets Update

October 24, 2006
Carmine Gallo, Author
'Simple Secrets of the World's Greatest Business Communicators"

December 5, 2006
Jeanne Smith, Author/Speaker
"And one more thing before I go … Practical insights and solutions to help you and your clients get your affairs in order."

January 23, 2007
Sam Harding, Retirement Administration
"Find Out What You Missed in 06"
Retirement Plans and New Options for Roth Conversion

February 27, 2007
Russell Hancock,
Joint Venture Silicon Valley
"Valley Economic Conditions"

March 27, 2007
Dick Gould, Stanford University
" Getting Better - Competing to Be The Best"

April 24, 2007
Dr. Elizabeth Landsverk
"Diminished Capacity in Elderly Clients"

May 22, 2007
John King, Alhouse-King Realty
"Mid-Peninsula Residential and Commercial Real Estate"

John W. King, CRB
Alhouse King / Keller Williams Realty

Peninsula & Silicon Valley
Residential Real Estate Market Update

John King has been a residential real estate broker in Palo Alto for over 23 years. As one of the area's most experienced real estate brokers, John will bring us up to date on the local market. Current trends and conditions, including the impact of the recent turmoil in the sub-prime mortgage market will be explored.

John holds an B.A. in Economics from Stanford and has held leadership positions in the real estate community as Chair of the Palo Alto Board of Realtors, Director for the Silicon Valley Association of Realtors and one of the original governors for REInfoLink, the regional Multiple Listing Service.

An active member of the local community, John is the current Chair of the Palo Alto Chamber of Commerce and Past President of the Palo Alto Kiwanis Club.

John lives in Palo Alto with his wife, Alison, and their 5 children.

John King

For more information about John, visit http://www.akrealty.com

Honor Roll of Sustaining Members

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- Carol Weeks Acker
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- John Rowden Davis
- Veronica R. Dostal
- Dorthea Dutton
- Bradford L. Elman
- Todd Flesner
- Sam Harding
- Cheryl G. Howell
- Joel Jakubsen
- Judy T. Johnson
- Stephen D. Johnson
- Kenneth R. Kaye
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Thank you to all of these individuals and organizations for their demonstrated commitment to the work of the Financial Planning Forum.

** Member News **

Share your news, announcements, and interesting bits of information with members of the Financial Planning Forum. To submit an item e-mail info@financialplanningforum.org.

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Forum Member Jeanne Smith appears in print.

Articles highlighting the work of Forum member and professional organizer, Jeanne Smith have recently been featured in national publications. Jeanne is quoted in the May 2007 issue of Kiplinger's Money Magazine
http://www.kiplinger.com/magazine/archives/2007/05/dadshouse.html
and the article in Jan-Feb. 2007 issue of The AARP Magazine.
http://www.aarpmagazine.org/lifestyle/conquer_clutter.html?print=yes

On - Line Registration Now Available

You can now register and pay for Financial Planning Forum membership and events on-line. Simply click on the links below and follow the directions on the website.

Financial Planning Forum Membership (click here)

Your payments can be made using a credit card or a bank account via Pay Pal.

The registration page will take you directly to the Pay Pal web site for payment. If you do not yet have an account with Pay Pal, it's a simple process to enroll.

We are hopeful that this will facilitate making it quick and easy to make reservations for future Forum events.

If you would like to mail in your payment: please make your check payable to the Financial Planning Forum and mail to:

Financial Planning Forum, C/O Karin Swanson, CPA, 2600 El Camino Real, Suite 600, Palo Alto, CA 94306

Call 650.842.0330

Mail/Fax Meeting Registration Form
April 25, 2007

*Registration deadline is 5:00 PM April 19, 2007 * Late Fee = $10.00*

Member Name: ____ ($42)_________

Guest Name: ____ ($52) _________

Guest Name: ____ ($52) _________

Total Enclosed: $ __________ _

Meal Choice: ______ Meat or ______ Vegetarian

Please make your check payable to the Financial Planning Forum and mail to:
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Questions: Call Karin @ (650) 842-0330
Fax: (650) 852-9912

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2006 - 2007
Meeting Dates
Sept. 26, 2006
Oct. 24, 2006
Dec. 5, 2006
Jan. 23, 2007
Feb. 27, 2007
Mar. 27, 2007
April 24, 2007
May 22, 2007

We're on the Web!

See us at:

www.financialplanningforum.org

About Our Organization…

The Financial Planning Forum, Inc. was founded in 1972 by a group of attorneys, accountants, financial planners, and life insurance professionals who recognized the mutual advantage of exchanging ideas and of networking with others who shared their interests in rendering quality services to their clients. The principal purpose of the organization is fostering professional growth through learning experiences and interaction.

Calendar and Activities

The Forum meets monthly, in September and October and from December through May.

- Each meeting includes a time for networking, dinner, and a featured presentation on a topic of current interest.
- Program formats include a mix of local and nationally recognized speakers, and seminars and panel discussions.
- Program topics include specific, technical discussions about recent financial, legal, tax and investment developments; and topics of more general interest, such as economic forecasts and demographic trends and implications.
- Monthly newsletter, occasional social gatherings, and a Web site. The Web site includes a membership directory where members can list and describe their businesses.

FINANCIAL PLANNING FORUM
2600 El Camino Real
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