2008 IMCA Advanced Wealth Management Conference

The Westin South Coast Plaza, Costa Mesa, CA — October 27–28, 2008

Sunday, October 26	
6–8 p.m	Registration/Information desk open
Monday, October 27	
7 a.m.–7 p.m.	Registration/Information desk open
7–8 a.m.	Breakfast with Exhibitors
8–8:15 a.m.	**Welcome and Opening Remarks** *Richard Joyner, CIMA®, Chair, Advanced Wealth Management Conference*
8:15–9:30 a.m.	**General Session #1: Investment Implications of the 2008 Election** *Gregory Valliere, Stanford Financial Group*
9:30–10:30 a.m.	**General Session #2: Post Olympics Post Election, …Now What? Market Outlook for 2009** *Mark W. Yusko, MBA, Morgan Creek Capital Management*
10:30–11 a.m.	Break with exhibitors
11 a.m.–12 p.m.	Educational Workshops
	Workshop #1: Taxation of Concentrated Equity Positions & Structured Products *Thomas A. Humphreys, JD, LLM, Morrison & Foerster LLP*
	Workshop #2: The Hitchhiker's Guide to Core/Satellite Investing *Scott Welch, MBA, CIMA®, Fortigent*
12–1 p.m.	Luncheon
1–2 p.m.	Educational Workshops
	Workshop #3: Tax and Non-Tax Aspects of Buy–Sell Agreements *William Weintraub, JD, Jeffer, Mangels, Butler & Marmaro LLP*
	Workshop #4: Value in the Taxable High Yield Market *John L. Creswell, MBA, CIMA®, Nuveen Asset Management*
2:05–3:05 p.m.	Educational Workshops
	Workshop #5: Safe Withdrawal Rates: Mechanics, Uses, and Caveats *Michael E. Kitces, MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL, CWPP™, Pinnacle Advisory Group*
	Workshop #6: Special Tax and Accounting Issues with Partnerships in Estate and Trust Administration *Carol A. Cantrell, CPA, JD, CFP®, Briggs & Veselka Co.*
3:05–3:30 p.m.	Break with Exhibitors
3:30–4:30 p.m.	**General Session #3: Spending Rules, Asset Selection, and the Risk of Ruin** *Michael Koehn, PhD, Analysis Group Inc.*
4:30–5:30 p.m.	**General Session #4: Investor Behavior** *Terrence Odean, PhD, Haas School of Business, University of California, Berkeley*
5:30–7 p.m.	**Reception with Exhibitors** *Sponsored by Charles Schwab Institutional*
Tuesday, October 28	
7 a.m.–1 p.m.	Registration/Information desk open
7–8 a.m.	Breakfast with Exhibitors
8–9 a.m.	**General Session #5: Private Equity** *Todd A. Hughes, CFA, Portfolio Advisors LLC*
9–10 a.m.	**General Session #6: The Care and Feeding of Family Limited Partnerships** *Thomas Handler, JD, PC, Handler, Thayer & Duggan, LLC*
10–10:15 a.m.	Break with Exhibitors
10:15–11:45 a.m.	**General Session #7: Practical Ideas and Collaboration Methods from Experienced Advisors—an Interactive Panel Discussion** ***Moderator:*** *A. Mark Harbour, CPA, CIMA®, CFP®, CFA®, Citi Smith Barney* ***Panelists:*** *Patricia M. Hall, MBA, CFA®, Hallmark Capital Corporation* *Marta Vago, PhD, Marta Vago, Inc.*
11:45 a.m.–12:45 p.m.	**General Session #8: Bad Apples or Bad Trees? Connecting Ethics, Values and Culture in Personal and Organizational Practices** *Steve Lawler, MBA, STM*
12:45 p.m.	Conference Adjourns