



FINANCIAL  
PLANNING  
ASSOCIATION  
ORANGE COUNTY

Marquis Partner:

BROWN &  
STREZA  
ATTORNEYS AT LAW

# TAX & FINANCIAL FORUM

NOVEMBER  
2022 **3**

8:30AM-5:15PM  
THE PACIFIC CLUB-  
4110 MACARTHUR BLVD-  
NEWPORT BEACH, CA

## SESSIONS INCLUDE:

*Client and Advisor Attitudes, Values and Biases In Light of Behavioral Finance Presented by Henrik Cronqvist, Dean, Argyros School of Business and Economics, Chapman University*

*Opportunities For Advisors Based on Recent Changes in the Law or Due to New and Revised Precedents Presented by Andrew Katzenstein, JD, LL.M, Partner, Proskauer Rose, LLP*

*How to Work With People of Wealth With Assets Abroad or Who Are Newly Arrived in the United States Presented by Cynthia Brittain, JD, TEP, Partner, Karlin and Peebles, LLP*

*Strategic Income Tax and Estate Planning Ideas For Digital Assets Presented by Jonathan Mintz, JD, TEP, Partner, Evergreen Legacy Planners, LLP*

*How Trust, Estate and Probate Litigation Can Affect and Drive the Future of an Advisor's Practice: How to Benefit From and Prevent This Type of Litigation Timothy Kay, JD, Partner, Snell & Wilmer, LLP*

**5 HOURS OF CFP CE, CA CPA CE, AND CA ATTORNEY MCLE\***

**FPA MEMBERS: \$95, NON-MEMBERS, \$115- SPACE LIMITED, REGISTER TODAY!**

Joining individuals in all areas of financial planning with top National tax and financial experts to grow business and successfully meet the needs of an expanding client base. join us for valuable in person networking or online for virtual networking. Wine reception to follow last speaker. Two raffles will take place, one in the morning and one at the close of the event.

**Non-Members: Your Registration Fee for this event will apply to your new FPA Membership**

REGISTER TODAY AT:

[HTTPS://WWW.FINANCIALPLANNINGASSOCIATION.ORG/FPA-ORANGE-COUNTY-2022-TAX-FINANCIAL-FORUM](https://www.financialplanningassociation.org/fpa-orange-county-2022-tax-financial-forum)

## FORUM FACULTY



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**TIMOTHY Kay**  
Partner,  
Snell & Wilmer



**Mistress of Ceremonies**  
Evelyn M. Zohlen,  
Inspired Financial