



For Immediate Release
October 2, 2009

FREE FINANCIAL PLANNING CLINIC TO ADDRESS BAY AREA'S SPECIFIC FINANCIAL QUESTIONS

OAKLAND - Mayor Ron Dellums, California State Controller John Chiang, State Senator Loni Hancock, Assemblymember Sandre Swanson, and Financial Planners Association (FPA) is hosting a free financial planning clinic on **Saturday, October 3rd, from 10am – 4pm at Oakland City Hall.**

“We are in the throes of one of the most unprecedented economic meltdowns in the history of this country,” said Mayor Dellums. “In the best of times, it is often difficult to manage one’s finances, but when we are faced with the stark realities of unemployment at record levels, foreclosures impacting nearly ever community, and the bleak economic outlook, financial management gets even harder. This clinic provides real answers at a critical moment. I applaud our partners and my fellow public servants for providing a quality service for our residents.”

“Financial planning and literacy are essential steps in securing a stable and secure financial future. This clinic will provide fundamental tools and knowledge to build a solid foundation that will prevent financial failure,” stated Assemblymember Sandré Swanson.

The clinic will include one-on-one guidance and planning assistance on general finances, retirement, investments, income taxes, insurance, estates, employee benefits and various workshops providing background and educational literature on all of these services and how they can help place our low-income families on the road to financial stability. Also, there will be a workshop dedicated to youth and young adults, ages 15 to 22, on budget and money management.

“This is a unique opportunity for all individuals, including small business owners to receive thorough, unbiased financial advice to help them attain or remain financially sound during these unprecedented economic times,” says Frank Paré of PF Wealth Management Group and FPA board member.

The event will provide the people of the Bay Area with a day of free financial advice and planning. The goal is to provide advice without any strings attached (during the clinic, financial professionals will not be allowed to distribute their business cards or other marketing materials). The clinic is predominantly targeting underserved communities where people do not have easy access to professional financial assistance. However, all residents with financial questions are welcome to attend.

The Clinic takes place on Saturday, October 3rd from 10am – pm at Oakland City Hall, 1 Frank Ogawa Plaza, Oakland, CA 94612. Contact: Iesha Powell, 510/286-1670, iesha.powell@asm.ca.gov for questions and early registration.

###

Program Agenda – October 3, 2009

10:00 – Welcome from officials of the event – City Council Chamber

Frank Paré & Leslie Biggers, FPA-East Bay Gov't Relations Co-Chairs
Kevin Keller, CEO of CFP Board
State Senator Loni Hancock
Assemblymember Sandré R. Swanson
Mayor Dellums' Office
OneCalifornia Bank CEO – Introduce Controller – Jeff Cheung
Keynote Speaker – John Chiang

11:00 – One-on-one Planning Sections Begin

General Financial Planning	Retirement Planning
Income Tax Planning	Investment Planning
Estate Planning	Insurance Planning
Employee Benefits	

11:15 – 12:00pm – Workshops to begin

Workshop 1 – “How to Prevent Foreclosure from Happening to You”; Joanne Baker and Latisha Carlisle– NID Housing – Foreclosure Prevention Workshop — Hearing Room 1

Workshop 2 – “Get Your Money Right”; Maria Costen (Cash Management Smart Consumer) from KBLX– Financial Planning for Youth and Young Adults — Hearing Room 2

Workshop 3 – “How to Care for Your Aging Loved Ones”; Jacqueline Mertz - Elder Care — Hearing Room 3

Workshop 4 – “Navigating Your Financial Waters”; Frank Paré - General Budgeting and Money Management — Hearing Room 4

12:00 – 12:30pm Seminar Lunch Break

12:30pm – 4:00pm – One-on-One Planning Sessions to Resume

1:00pm – 2:00pm - Workshops to repeat

Workshop 1 – “How to Prevent Foreclosure from Happening to You”; Joanne Baker and Latisha Carlisle– NID Housing – Foreclosure Prevention Workshop — Hearing Room 1

Workshop 2 – “Get Your Money Right”; Maria Costen (Cash Management Smart Consumer) from KBLX– Financial Planning for Youth and Young Adults — Hearing Room 2

Workshop 3 – “How to Care for Your Aging Loved Ones”; Jacqueline Mertz - Elder Care — Hearing Room 3

Workshop 4 – “Navigating Your Financial Waters”; Frank Paré - General Budgeting and Money Management — Hearing Room 4

For more information on Mayor Ron Dellums and the City of Oakland, please visit and bookmark the following Web accounts:



: <http://www.youtube.com/ronalddellums>



: <http://www.facebook.com/pages/Ron-Dellums/98961200747>



: <http://www.twitter.com> "Mayor Dellums"



: <http://www.nualerts.com/clubs/mayordellums/>