



**It is The Most Wonderful Time of the Year,
the SCTP Holiday Party!!!**

December 12, 2018 meeting, Registration at 5:00 p.m.,

Hors D'Oeuvres and Drinks at 5:30,

Educational Speaker at 6:15,

Following the speaker we will be having our Annual gift raffle for all attendees. Please come and see if your name is drawn and pick out a prize!

Speaker information below.

ALL Reservations must be paid by the Friday prior to the meeting. Everyone must make a reservation for this meeting, even if you are registered on the Pre-Paid list.

Cost: \$35 for members, \$45 non-members and \$50 at the door

Location: Handlery Hotel, 950 Hotel Circle North, San Diego, CA 92108

Click the links below to use our Pay Online System to register for the monthly dinner meetings, renew or join SCTP membership.

December 12, 2018

Speaker: Fred Wollman

Topic: Rewriting Your Financial Narrative

What is the story you keep telling yourself about money? When is saving for kid's college a bad idea?

When is a growing economy & rising stock market a bad thing? Certified Financial Planner Fred

Wollman will discuss these ideas and several more in this informative hour.

1 hour of Education: 1 Hour Tax Update



Fred Wollman earned his Certified Financial Planner "CFP®" credential in 1984, Master Planner Advanced Studies "MPAS®" designation in 2015 and the Accredited Investment Fiduciary designation "AIF®" in 2018. He holds securities registrations 7, 63, and 24. He is registered in twelve states in addition to holding a California life and disability insurance license. From 1987 through 1990, Fred taught the CFP classes to aspiring financial professionals at San Diego State University. Fred is the author of *Rewriting Your Financial Narrative*.

He is on the board of the Valley Center Trails Association and the ECOLife Conservation and a member of 1% for the Planet.



**Monthly dinner meeting
registration online payment
center**

[Register now for the dinner
meeting using our online pay
system.](#)

the SCTP newsletter keeps our members and colleagues up to date on important information. CIAL NOTE--- QUICKFINDER ORDE

SCTP has new classified ads posted this month. [Click here to view](#)

SCTP has added the **2018 Education Speaker list** to each issue of our newsletters for your convenience. View the list of speakers below.

Mark your calendars now for **January 9, 2019**-"2018 Year End Update", guest speaker, **Eugene Ostermiller, EA**. **More information coming soon**



Dinner Menu

Heavy Hors D'Oeuvres and Drinks will served before the Educational speaker. Drinks will also be available after the speaker.

Brewed Coffee, Decaffeinated Coffee and Tea

Iced Tea will also be served.



**2018-2019 Membership
new/renewal.**

Become a member of SCTP or renew your current membership now.

[Click here to be directed to the
Membership Center](#)



DECEMBER 2018 PRESIDENT'S LETTER

I am keeping it short and sweet this month for the President's message. The holidays are a busy time of year, and we are in full swing these days. I hope everyone had a great Thanksgiving, and is gearing up for a fun end to 2018.

For December, we have Fred Wollman speaking on retirement issues facing our clients. Fred will be speaking for one hour on tax law update. We will then move onto our holiday celebration and have some time to catch up and enjoy each others company. We will have our annual prize raffle and give away some fun and useful gifts for your office or home. You can not win if you do not attend. It is always a fun time and I look forward to seeing you there.

Please mark your calendars for January 9th when we will have Eugene Ostermiller speak at our annual update meeting. With all of the changes to the tax code this year with the Tax Cuts and Jobs Act there is plenty we could all learn. Please look for the sign up email to hit your inbox soon.

As always, please reach out to any Board member if you have any questions or would like to contribute to SCTP.

Respectfully,

Marc Lord

President

SCTP 2018 Education Speakers

[Visit our reservation center to sign up online](#)

December 12, 2018- Holiday Party – Fred Wollman, CFP, MPAS

Speaker – 1 hour Tax Law Update

Topic - Rewriting Your Financial Narrative

January 9, 2019-"2018 Year End Update" Eugene Ostermiller, EA.

CTEC required hours

10 hrs- Federal Tax Law
3 hrs- Federal Tax Law Update
2 hrs- Ethics
5 hrs- California
Total of 20 hours

Meet the SCTP Board

Officers

Click to [edit Email Preferences](#) or [Unsubscribe](#) from this list.
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