NEWS

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Financial Coach Attends 2018 Best Regional Conference for Financial Planners

William Pitney, financial planner and found of FocusYOU attends FPA NorCal in San Francisco

SAN MATEO, CA (June 4, 2018) – William Pitney, MBA, CFP®, CeFT®, financial planner and coach of FocusYOU attended the 46th Annual Financial Planning Association's NorCal conference (FPA NorCal) in San Francisco held May 29 – May 30. "Every year FPA NorCal continues to exceed expectations," says Pitney. He continues, "Amazing technical content, quality speakers, and networking opportunities."

FPA NorCal is the premier regional planning conference hosted by the regional FPA chapters in the San Francisco Bay Area and Northern California. FPA NorCal is recognized nationally as being among the best conferences for CERTIFIED FINANCIAL PLANNER™ professionals and other financial professionals. This 46th annual conference delivered quality educational and technical workshops by high caliber experts and keynote speakers.

Conference workshops covered a range of topics from innovations offered by Roboadvisors to technology to transforming a planning practice, from topics on managing investors in the "Grey Zone" to hot topics like healthcare policy under the current administration and lessons learned from the North Bay fires. Every keynote and each session that Pitney attended influenced his day-to-day business decisions.

The most exciting moment for Pitney was meeting Rosie Rios, who served on the U.S. Department of the Treasury/Federal Reserve Transition Team from 2008-2015, and then Treasurer of the United States. "To spend time chatting with former Treasurer Rios, whose signature is on billions of dollars of US currency, and learn about her journey was very uplifting," states Pitney. During her keynote Rios shared behind the scenes of what happened during the 2008-09 financial crisis. She also shared what she learned about the history of U.S. currency creation.

Perhaps the most important session Pitney attended was on healthcare policy. He says, “Dr. Carolyn McClanahan explained balance billing and how the out-of-network service provider can bill you the difference between what your insurance covers and the actual charges. This can be very costly for patients because there are no limits on what out-of-network providers can charge. The good news is balance billing is now illegal in California.”

Dr. McClanahan shared ways to be an empowered patient and what questions to ask your doctor and other service providers. “She encouraged us to share her questions and materials in newsletters and other mediums to help our clients to become empowered healthcare users as well,” added Pitney

To learn more about Pitney, visit FocusYou.com

About William Pitney
William Pitney, founder and financial coach of FocusYOU in Foster City and Santa Rosa, California, has been serving clients as a professional financial planner since 2003. He is a member of the Financial Planning Association, Sudden Money Institute, International Association of Registered Financial Consultants, and Peninsula Estate Planning Council. Committed to a higher fiduciary standard of excellence, he has passed a rigorous certification and examination process in order to earn the professional designations of CERTIFIED FINANCIAL PLANNER™ professional and Certified Financial Transitionist. FocusYOU delivers practical, fully integrated financial strategies and solutions to address the financial planning needs of clients. For more information, visit FocusYou.com.

About FPA NorCal
The Financial Planning Association NorCal Conference is an annual two-day gathering of the top financial planning professionals from the San Francisco Bay Area and across the United States. Starting in 1971, the NorCal Conference attracts more than 700 financial professionals and affiliated professionals from across the nation.

About Financial Planning Association®
The Financial Planning Association® (FPA®) is the principal professional organization for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals, educators, financial services providers and students who seek advancement in a growing, dynamic profession. The primary aim of FPA is to elevate the profession that transforms lives through the power of financial planning. FPA supports high standards of professional competence, ethical conduct and clear, complete disclosure when serving clients. FPA’s One Connection™ for professional development, business success, advocacy and community at the national and chapter levels is truly indispensable in the advancement of today's CFP® professionals. Learn more about FPA at OneFPA.org.

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