Juan C. Ros, CFP®, CSPG, AEP®, CEPA, CVGA®

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FINANCIAL ADVISOR

- CERTIFIED FINANCIAL PLANNER™ professional located in Thousand Oaks, serving business owners and multi-generational families in the greater Los Angeles area and across the country
- Specializing in financial planning for business owners, including a focus on increasing business value and collaborating with an interdisciplinary professional team to facilitate a successful business transition
- Noted expert in philanthropic planning, planned giving, and major gifts
- Presenter, published author, and blogger on charitable and financial topics

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PROFESSIONAL EXPERIENCE (last 15 years)

2019 – PRESENT **Forum Financial Management, LP, Thousand Oaks, CA**
Financial Advisor

- Proactive financial planning, estate, tax, charitable, and investment strategies for business owners and families so they can spend more time doing what they love

2012 – 2018 **Lamia Financial Group, Inc., Thousand Oaks, CA***
Lamia Financial Group joined Forum Financial Management in January 2019
Principal | Vice President for Financial Planning and Philanthropy

- Lead the firm's philanthropic planning strategies
- Chaired the firm's Financial Planning Committee

2008 – 2012 **Ronald Reagan Presidential Foundation, Simi Valley, CA**
Director of Development

- Raised in excess of $18 million in deferred gift expectancies
- Managed a portfolio of planned giving and major gift prospects
- Coordinated the activities of the Ronald Reagan Legacy Council and grew the Council to over 100 members
- Implemented a comprehensive, multi-faceted gift planning program where one had not previously existed
- Launched and grew the Professional Advisory Council program to four groups with over 35 members

2001 – 2008 **The ALS Association (National Office), Calabasas Hills, CA**
Vice President for Philanthropy (2008); Director, Gift Planning (2003-2007)
Director, Major Gifts (2001-2003)

- Managed national development effort with annual revenue goal of $13 million.
- Exceeded gift planning budget in four consecutive fiscal years (2004-07). Revenue increased from $1.5 million to $4.1 million over four years.
- Secured 14 new planned giving donors in a three month period, increasing gift expectancies by approximately $1,675,000, including a $1,000,000 testamentary commitment.
- Coordinated acceptance of a gift of a yacht worth $185,000.
- Provided strategic input in negotiation of $25 million ALS Charitable Trust.
- Led implementation of a new charitable gift annuity program, including Board approval, state registrations, selection of investment and administration firm, and internal processes.
- Developed and implemented gift planning marketing plan. Supervised production of gift planning marketing materials such as quarterly newsletter, postcards, brochures, articles, and web site.

OTHER BUSINESS EXPERIENCE

Founder, Financially Zen, LLC (2020 – present)
Providing personal finance content delivered online and through social media channels.

American Institute for Philanthropic Studies, Long Beach, CA (2015 – present)
Faculty member for Certified Specialist in Planned Giving (CSPG) designation program
- Financial Planning module (Two-day session)

The Planned Giving Company, Media, PA (2006 – 2008)
Served as Consulting Partner, assisted with business development and client services.

VirtualGiving.com, Inc., King of Prussia, PA (2005 – 2008)
Assisted in development of new features on gift planning web sites.

EDUCATION

Master of Business Administration, California Lutheran University, Thousand Oaks, CA (2009)
- Emphasis in Financial Planning

Bachelor of Arts, Film and Video (with Honors), Pennsylvania State University, State College, PA (1988)
- *Summa cum laude*; School of Communications Valedictorian; Minor in English

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PROFESSIONAL DESIGNATIONS

CERTIFIED FINANCIAL PLANNER™ designation, CFP Board of Standards (2010)

Certified Specialist in Planned Giving (CSPG) designation, American Institute for Philanthropic Studies (2005)

Accredited Estate Planner (AEP®), National Association of Estate Planners and Councils (2018)

Certified Exit Planning Advisor (CEPA), Exit Planning Institute (2020)

Certified Value Growth Advisor (CVGA®), Corporate Value Metrics (2021)

PRESENTATIONS

Making Philanthropy a Part of Your Financial Planning Practice
- Financial Planning Association Business Success Knowledge Circle (February 2021)
- Financial Planning Association National Conference (October 2020)
- XY Planning Network National Conference (October 2020)

Charitable Gifts of Real Estate
- ProVisors Conejo Valley Real Estate Affinity Group (October 2019)

Bridging the Divide: The State of the Collaboration Between Gift Planners and Professional Advisors
- Western Regional Planned Giving Conference (May 2019)

How to Think Like a Financial Planner
- Planned Giving Round Table of Orange County (September 2015)
- Partnership for Philanthropic Planning of Greater Los Angeles (PPP-LA) (January 2015)

A Charitable Giving Primer – Do's, Don'ts, Tips, and Tricks
- Association of Fundraising Professionals – Santa Barbara/Ventura Counties Chapter (October 2013)
- Financial Planning Association of Ventura County (October 2011)

Advanced Case Study: Working with Financial Advisors: Best Practices from Here to Honduras
- PPP-LA (November 2012)

Megatrends in Gift Planning
- Cancer Support Community Affiliate Leadership Conference (November 2012)
- PPP-Lone Star Council (October 2011)

Tales from the "Dark" Side: How Professional Advisors and Gift Planners Can and Should Collaborate to Increase Philanthropy
- Planned Giving Council of Ventura County (July 2012)

Where The Rubber Meets the Road: Effective Donor Visits
- PPP-Lone Star Council (October 2011)
- PPP-LA (November 2009)
- Santa Barbara PG Round Table (September 2009)
- Inland Empire PG Round Table (July 2009)
- Planned Giving Council of Ventura County (January 2009)

Case Study Co-Author, 13th Annual Gold Coast Multidisciplinary Estate Planning Workshop
- Estate Planning Council of Ventura County (May 2011)

Advanced Case Study: Financial Planning in the Charitable Gift Planning Process
- PPP-LA (March 2010)

PUBLISHED

- *Understanding the CARES Act*, Planned Giving Today, June 2020
- *What Gift Planners Need to Know About the SECURE Act*, Planned Giving Today, March 2020
- *Top Four Opportunities for Planned Giving Conversations*, Planned Giving Today, November 2019
- *Trust Named as an IRA Beneficiary? Use Caution*, Planned Giving Today, June 2019
- *Give Donors One Advisor Referral, Not Three*, Planned Giving Today, December 2018
- *TCJA Unlocks New Opportunities for Donors*, Planned Giving Today, July 2018
- *Why Financial Advisors and Gift Planners Don't Work Together More Often Parts 1 and 2*, Planned Giving Today, January-February 2018
- *Financial Abuse of Elders: A Growing Problem*, Planned Giving Today, July 2017

- *What Gift Planners Need to Know about Long Term Care Insurance Parts 1 and 2*, Planned Giving Today, October-November 2016

- *Trends in Financial Planning for 2016 (and Beyond)*, Planned Giving Today, May 2016

- *New Adviser: End "Dark Side" Thinking*, Planned Giving Today, September 2012

- *Using a Proactive Prospecting Strategy*, Planned Giving Today, July 2011

ASSOCIATIONS AND VOLUNTEERISM

- Member, Los Angeles Council of Charitable Gift Planners, 2003 – present
  - Board Member, 2006-2009 (President in 2008)
  - Western Regional Planned Giving Conference Co-Chair, 2006

- Member, Financial Planning Association (National) and Ventura County chapter, 2006 – present
  - Winner, FPA National Diversity Scholarship, 2012
  - Ventura County Chapter: Board Member, Scholarship Chair, Program Chair, 2011-2013

- Member, Conejo Valley Estate Planning Council, 2009 – present
  - Board member, 2017 – present (President in 2019 and 2020)

- Member, ProVisors, 2013 – present

- Board member, Fit 4 the Cause, Inc., 2018-present
  - Board Treasurer (2018-19), Board Secretary (2019-present)

- Former Board member, Make-A-Wish® Tri-Counties, 2012-2015
  - Board Secretary, 2014-2015
  - Member, Investment Committee, 2014-present; Chair, Donor Stewardship Task Force, 2013-2015