FPA FINANCIAL PLANNING ASSOCIATION

BE

FPA ANNUAL CONFERENCE –

BE Baltimore 2016

The Largest Gathering of CFP® Professionals

SEPTEMBER 14 – 16, 2016

Wednesday, September 14

7:00 AM – 8:45 AM	**CFP Ethics**				
9:00 AM – 10:30 AM	**Welcome** Susan Mitcheltree, CFP®; **General Session** – TBD				
TRACKS	**Advanced Planner Technical Track**	**Practice Management, Marketing and Technology Track**	**Daily Specialty Track - Investment Planning**	**Daily Specialty Track - Suddenly Single Track (Divorce/Widow)**	**Practitioner of the Future Track**
10:45 AM – 11:35 AM	The Top 50 Insurance Planning Mistakes and How to Avoid (Fix) Them Lawrence Brody, J.D., LL.M.	Best Practices Super Session: Marketing Ideas in a Changing Practice Environment Panel Discussion	Is Modern Portfolio Theory Dead? Portfolio Construction in Uncertain Times TBD	Advising Clients Through the Toughest Times of Life Amy Florian	NexGen
11:35 AM – 7:30 PM	**Exhibit Hall Open**				
11:45 AM – 1:00 PM	**Lunch in Exhibitor Area/Lunch Discussion/Professional Development Center Session**				
1:00 PM – 2:00 PM	Year-End Income Tax Planning Opportunities TBD	Best Practices Super Session: Building a $500 Million AUM Practice Panel Discussion	The Global Impact of Investing TBD	Divorce: High Level Tax Implications Jeremiah Doyle, IV, J.D., LL.M.	Business Rapid Fire
2:00 PM – 2:15 PM	**Break**				
2:15 PM – 3:05 PM	Why Heirs Should Fear a Parent's New Marriage More Than the Tax Collector John Scroggins, J.D., AEP®, LL.M.	Best Practices Super Session - Technology Panel Discussion	Planning with Health in Mind Carolyn McClanahan, M.D., CFP®	Business Divorce - Separating Your Practice from Your Partners Before the Mistakes Begin TBD	*Journal of Financial Planning*/ Academy of Financial Services Research Presentations Part 1
3:05 PM – 3:20 PM	**Break**				
3:20 PM – 4:10 PM	Planning with Health in Mind Carolyn McClanahan, M.D., CFP®	TBD	The Incredible Shrinking Alpha Larry Swedroe	So Now You are Suddenly a Sole Practitioner! Making the Transition from the Firm Environment TBD	Economic Update TBD
4:30 PM – 5:30 PM	Roundtable - Retirement Realities	Roundtable - Growing Your Practice to the Next Level	Roundtable - Suddenly Single (Divorce and Widow) Concerns	Roundtable - The Advisers Guide in What to Look for when Purchasing and Using Financial Planning Related Software	
4:30 PM – 7:00 PM	**Opening Reception in the Exhibit Hall, Professional Development Center Sessions**				

Thursday, September 15

6:45 AM – 7:45 AM	**Breakfast**				
7:00 AM – 7:55 AM	**Sponsored Breakfast Sessions**				
8:00 AM – 9:30 AM	**General Session – TBD**				
TRACKS	**Advanced Planner Technical Track**	**Practice Management, Marketing and Technology Track**	**Daily Specialty Track - Elder Care and Estate Planning**	**Daily Specialty Track - Succession Planning**	**Practitioner of the Future Track**
9:45 AM – 10:35 AM	Asset Protection Strategies: What Works and What Doesn't Steven Oshins, J.D., AEP®	Successful Financial Planning Strategies Using Social Media Laura Virili	Effective Estate Planning for Diminished Capacity - Having the Tough Conversations with Clients and Assisting Children TBD	Social Security - Understanding How to Work the System TBD	NexGen
10:30 AM – 7:30 PM	**Exhibit Hall Open**				
10:35 AM – 11:00 AM	**Break**				
11:00 AM – 11:50 AM	Assessing Through Which Retirement Plans Make the Most Sense for Your Clients TBD	TBD	Learning from the Estate Planning of Deceased Celebrities John Scroggins, J.D., AEP®, LL.M.	The Economics of Selling Your Business to Employees David DeVoe, MBA	*Journal of Financial Planning*/ Academy of Financial Services Research Presentations Part 2
11:50 AM – 1:20 PM	**Lunch in Exhibitor Area/Lunch Discussion/Professional Development Center Session**				
1:20 PM – 2:10 PM	Long Term Care Planning - Financial, Emotional, and Real World Decisions Carolyn McClanahan, M.D., CFP®	Women and Investing: How to Attract Women Investor Clients to Your Firm Britteny Castro, CFP®, CRPC®, AAMS	Using Trusts to Save State Income Tax Steven Oshins, J.D., AEP®	Best Practices Super Session: Succession Planning Realities from the Seller and the Buyer Perspective Panel Discussion	CFP Board Presentation
2:10 PM – 2:25 PM	**Break**				
2:25 PM – 3:15 PM	TBD	Planning for the All Stars - Military Financial Issues TBD	Estate Planning for Non-Traditional Couples (Since Windsor and Obergefell U.S. Supreme Court Cases) Jeremiah Doyle, IV, J.D., LL.M.	Succession Planning Mistakes to Avoid Mark Tibergien	Global Update TBD
3:15 PM – 3:45 PM	**Break**				
3:45 PM – 4:35 PM	Using Form 1040 to Identify Financial Planning Opportunities Jeff Rattiner, MBA, CFP®, CPA, RFC	Best Practices Super Session: Career Paths and Internships Challenges and Opportunities Panel Discussion	Digital Estate Planning Suzanne Brown Walsh, J.D.	Charitable Giving Trends: Leveraging Complex Assets to Maximize Impact for Your Clients Ryan Boland, J.D. & Julia Chu, J.D., LL.M.	FPA Leaders Panel FPA Board Members and Leadership
4:50 PM – 5:40 PM	Roundtable - Insurance and Annuities	Roundtable - Practice Management & Marketing Issues for NexGen & Millennials	Roundtable-Estate Planning	Roundtable-Succession Planning Issues	Roundtable - Life! What's on Your Mind as a Financial Planner
4:45 PM – 7:00 PM	**Reception in the Exhibit Hall, Professional Development Center Sessions**				
8:30 PM – 11:30 PM	**FPA Annual Conference Party**				

Friday, September 16

6:45 AM – 7:45 AM	**Breakfast**				
7:00 AM – 7:55 AM	**Sponsored Breakfast Sessions**				
8:00 AM – 9:30 AM	**General Session – TBD**				
8:45 AM – 2:00 PM	**Exhibit Hall Open**				
9:30 AM – 10:00 AM	**Break**				
TRACKS	**Regulatory Track and Today's Practitioner Issues**	**Daily Specialty Track - NexGen**	**Daily Specialty Track - Niche Planning**	**Daily Specialty Track - Education Planning**	**Practitioner of the Future Track**
10:00 AM – 10:50 AM	Regulatory Concerns - Post Election Marcia Wagner, J.D.	Being Compliant with Social Media Use Daniel Hill, J.D.	Creative IRA Distribution Planning Ideas Robert Keebler, CPA/PFS, MST, AEP®, CGMA	The Most Efficient Ways to Save and Pay for College Fred Amrein, MBA, ChFC®	*Journal of Financial Planning*/ Academy of Financial Services Research Presentations Part 2
10:50 AM – 11:05 AM	**Break**				
11:05 AM – 11:55 AM	CyberSecurity Issues in Financial Services: How to Stay Protected Daniel Hill, J.D.	Best Practices Super Session: How to Work with the Media Panel Discussion	Watching Out for the IRS: Preparing Yourself David Kirk	Managing Student Debt: Strategies for Getting Out from Under Fred Amrein, MBA, ChFC®	
12:00 AM – 1:00 PM	**Lunch in Exhibitor Area**				
1:00 PM – 3:00 PM	**CFP Ethics**				