

2020 SYMPOSIUM AGENDA

Wednesday, September 23

- 8:00am Welcome
- 8:10am Elder Law Panel: It's Not Inheritance Until They Are Dead | Stratford Kiger, Bank of America Private Bank & Laura O'Dea, Assisted Living Locators
- 9:00am Networking Break
- 9:20am Charitable Planning | Neal Emmons, Foundation for the Carolinas & John Cullum, the American Heart Association
- 10:40am Networking Break
- 10:55am Market Outlook | Brian Levitt, Invesco
- 12:00pm Adjourn for the day

Thursday, September 24

- 8:00am Welcome
- 8:10am Tax Update | Michael Means, CPA
- 9:00am Networking Break
- 9:20am Special Needs Planning | Kelly Garner, Bank OZK
- 10:40am Networking Break
- 10:55am Roadmap to Fixed Income Investing in an Pandemic Economy | Eddy Vatatru, CFA, Osterweis Capital Management
- 12:00pm Adjourn