FPA

Annual Conference 2020

September 30–October 2

Wednesday, September 30

All Times Listed are in Pacific Time

9:00 AM–10:00 AM	Opening General Session
9:00 AM–1:30 PM	Exhibit Hall
10:00 AM–11:15 AM	Break
11:15 AM–1:15 PM	Financial Planning Challenge: How Do You Know?
	BLOCK 1
11:15 AM–12:15 PM	*Beyond Referrals: How to Help the Next Generation of Advisors Grow Your Firm* Presented by Kristin Harad *How to Best Take Advantage of Tax Changes for High-Net Worth Clients* Presented by Mishkin Santa *The Hardest Retirement Gap To Fund And Protect: The Psychological Side Of Life After Work* Presented by Robert Laura *BETR off Roth?* Presented by Joel Dickson
12:15 PM–12:45 PM	Break
	BLOCK 2
12:45 PM–1:45 PM	*Intentional Business Leadership in Times of Uncertainty and Change* Presented by Lisa Kirchenbauer *Medicare and Today's Financial Advisor: The Health/Wealth Convergence* Presented by Barry Streit *Divorcing Clients: Avoid Being the Next Breakup* Presented by Cheryl Panther *Five Diversity and Inclusion Leadership Strategies for EACH of Us* Presented by Lisa Ong *Guaranteed Income: The Forgotten Household Asset* Presented by David Blanchett *Philanthropic Solutions in Financial Planning, an FPA & AHA Certificate Program* Presented by Lorraine del Prado
1:45 PM–3:45 PM	On Demand Content **Catch up on selected sessions you may have missed

Thursday, October 1

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7:00 AM–9:00 AM	On Demand Content **Catch up on selected sessions you may have missed
9:00 AM–1:30 PM	Exhibit Hall
	BLOCK 3
9:00 AM–10:00 AM	*Setting the Planning Table for Client and Charity Success* Presented by John Cullum *Transform Your Practice: A Panel Discussion Scaling Your Business Up to Succession* Presented by Susan Danzig, Lynn Ballou, & Jeff Nash *Interpreting Financial Aid Award Letters—Creating Transparency for Families* Presented by Cozy Wittman *Key Retirement Plan Changes and Updates for 2020 and Beyond* Presented by Denise Appleby *Estate Planning—Now!* Presented by Richard Rojeck *Answering Tough Client Questions* Presented by Jake DeKinder *Academic Research Presentations (JFP/AFS), Part 1*
10:00 AM–10:30 AM	Break
	BLOCK 4
10:30 AM–11:30 AM	*Keep Clients on Track Through Life's Ebbs and Flows* Presented by Robert Bolen *Blend Out—How Ordinary Advisors Transform into Irresistible Brands* Presented by Robert Sofia *Life Happens: Prepare Your Clients and Their Families, Build Loyalty and Inter-generational Reach, and Protect Yourself* Presented by Amy Florian *Making Philanthropy a Part of Your Financial Planning Practice* Presented by Juan Ros *Housing Wealth in the Financial Planning Process – Review of Case Studies and the Latest Research on Retirement Enhancement Strategies* Presented by Stephen Resch and Phil Walker *Academic Research Presentations (JFP/AFS), Part 2*
11:30 AM–12:30 PM	Break
	BLOCK 5
12:30 PM–1:30 PM	*Positive & Productive Client Communication: Behavioral Finance Principles in Action* Presented by Barbara Kay *Recruiting and Managing Talent for Your Firm in a Post COVID-19 World* Presented by Caleb Brown *Protecting Seniors from Scams and Identity Theft* Presented by Steven Weisman *Estimating "The End" of Retirement* Presented by David Blanchett *Academic Research Presentations (JFP/AFS), Part 3*
2:00 PM–4:00 PM	CFP Ethics: Elevating the Profession **Additional Charges Apply, Limited Capacity

Friday, October 2

All Times Listed are in Pacific Time

7:00 AM–9:00 AM	On Demand Content **Catch up on selected sessions you may have missed
9:00 AM–12:30 PM	Exhibit Hall
	BLOCK 6
9:00 AM–10:00 AM	*Tech to Connect with Video: Building and Maintaining Meaningful (and Profitable) Relationships in an On-Screen World* Presented by Julie Holmes *Estate Planning For After the Election and COVID* Presented by Gary Altman *Latest Tax Planning Strategies for Financial Planners* Presented by Lawrence Pon *Succeeding at Succession—How to Transition Your Practice Profitably & Proudly* Presented by George Hartman *Giving Back with Pro Bono Financial Planning* *Student Breakout Session*
10:00 AM–11:00 AM	Break
	BLOCK 7
11:00 AM–12:00 PM	*Client Communication Through Periods of Crisis* Presented by Scott Hanson *Must Know Research for Advising Retirees* Presented by Dan Moisand *The Convergence of Healthcare and Financial Planning* Presented by Peter Stahl *Regulatory Compliance 2020* Presented by Marina Baranovsky *Broken Bonds: Assessing Bonds, Risks and the Future of Asset Allocation* Presented by Marc Odo *2020 Montgomery-Warschauer Award-Winning Research - Goals-Based Financial Planning: How Simple Lists Can Overcome Cognitive Blind Spots* Presented by Samantha Lamas, Ryan O. Murphy and Ray Sin *Student Breakout Session*
12:00 PM–12:30 PM	Break
12:30 PM–1:30 PM	Closing General Session

This schedule is subject to change.