



**FINANCIAL
PLANNING
ASSOCIATION**

**SOUTHWESTERN
OHIO**

2021 Calendar of Events

Month	Type of Meeting	Topic	Speaker	Date	Time	Location
January	Chapter Meeting	Asset Allocation Viewpoints & Positioning	Matt Pallai	Tuesday, January 19 th	11:30am – 12:30pm	Live Webinar
February	Member Networking Event	Virtual Beer Tasting with Municipal Brew Works	Jim Goodman	Thursday, February 18 th	4:00pm – 6:00pm	Live Virtual Presentation with a Certified Cicerone
March	Ethics Program	CFP Ethics	William Schretter	Wednesday, March 3 rd	2:00pm – 4:00pm	Live Webinar
	Chapter Meeting	Planning Opportunities with IRAs and Qualified Plans	Ken Boothe	Tuesday, March 16 th	11:30am – 12:30pm	Live Webinar
April	Chapter Meeting	Economic and Market Update	Brandon Zureick	Tuesday, April 20 st	11:30am – 12:30pm	Live Webinar
	Member Networking Event	Networking Group Kick Off! Women, Diversity & Inclusion, NexGen & Career Changers, Retirees	N/A	Wednesday, April 28 th	11:30am – 12:30pm	Live Virtual Event
May	Chapter Meeting	Biden Tax Plan	Jeffrey Levine	Tuesday, May 18 th	11:30am – 1:00pm	Live Webinar

Month	Type of Meeting	Topic	Speaker	Date	Time	Location
June	Chapter Meeting	Behavioral Finance	Michael Kitces	Wednesday, June 16 th	11:30am – 1:00pm	Live Webinar
July	Chapter Meeting	ROTH	Jeffrey Levine	Tuesday, July 20 th	11:30am – 1:00pm	Hybrid Event* Your choice: Webinar or In-Person Rookwood Tower 3805 Edwards Road, #550 Cincinnati, OH 45209
August	Chapter Meeting	The 411 on Ohio's 529 College Savings Plan	Timothy Gorrell	Tuesday, August 17 th	11:30am – 12:30pm	Hybrid Event* Your choice: Webinar or In-Person Executive Park 4010 Executive Park Drive Executive Exchange, #120 Cincinnati, OH 45241
	Networking Event	Happy Hour	N/A	Wednesday, August 25 th	4:30pm – 6:30pm	Senate Blue Ash 1100 Summit Place Drive, Blue Ash, OH 45242
September	Ethics Program	CFP Ethics	William Schretter	Wednesday, September 1 st	2:00pm – 4:00pm	Hybrid Event* Your choice: Webinar or In-Person Rookwood Tower 3805 Edwards Road, #390 3rd Floor Conference Room Cincinnati, OH 45209
	Special Event	Advocacy Day	N/A	Wednesday, September 29 th	All Day	Field Trip

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Change Tomorrows™

October	Chapter Meeting	Tax Update	William Vasil	Tuesday, October 26 th	11:30am – 12:30pm	Hybrid Event*
November	Chapter Meeting	Housing Update	Barry Habib	Tuesday, November 16 th	11:30am – 12:30pm	Hybrid Event*

*The Financial Planning Association of Southwestern Ohio (FPASWO) is monitoring the public health response to and guidance about the coronavirus disease 2019 (COVID-19). The board of directors, in cooperation with our staff team, is following appropriate state and national guidance about managing business events, which includes information from the Centers for Disease Control (CDC), World Health Organization, U.S. State Department, etc. ***As we continue to plan for future events, please note that we retain the right to change and/or cancel any events or meetings if doing so is in the best interest of the health of the attendees/members.*** Should we decide to cancel an event, you will be notified via email and any registration fees will be refunded.