FPA

NexGen Gathering

August 12–13, 2021 | Virtual Event

Wednesday, August 11

All Times Listed are in Pacific Time

*This two-hour bonus event is offered twice on 8/11 during the indicated times

8:00 AM – 8:15 AM & 1:00 PM – 1:15 PM	**Introduction of the exclusive event**
8:15 AM – 8:45 AM & 1:15 PM – 1:45 PM	**Resume Building and Interview Practice** Consult with Human Resources representatives from participating partner firms for tips and tricks to strong resumes and excellent interviews
8:45 AM – 9:30 AM & 1:45 PM – 2:30 PM	**Clubhouse Conversations** Candid conversations between attendees and subject matter experts on areas that are most important to our NexGen planners. Topics include: Company Culture, Pro Bono, What is Financial Planning, Lifelong Learning, Work/Life Balance and Wellness, Diversity, Equity & Inclusion
9:30 AM – 10:00 AM & 2:30 PM – 3:00 PM	**Case Study Presentations** Interactive case study presentations via the top financial planning tools that highlight how impactful financial planning can be and the positive influence it can have on people's lives. Cases will be focused on meaningful and relevant life events and goals of our NexGen clientele

Thursday, August 12

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10:00AM–10:30AM	**Welcome & Kick-off**
10:30 AM–11:30 AM	**Opening General Session - Socially Responsible Investing: Integrating Issues of Racial, Gender, Economic and Climate Justice into Investment Portfolios** *Rachel J. Robasciotti*
11:30 AM–12:00 PM	Break | **Visit the partners powering this event in the exhibit hall!**
12:00 PM–1:00 PM	**Concurrent Breakout Sessions** • Accelerating Your Personal Brand With a Client Avatar - *Mary Beth Storjohann, CFP®* • How to Adapt and Thrive as a New Financial Planner - *Dr. Stephen Brody, CFP, ChFC, RLP* • Beyond the CFP: Additional Certifications – *Shane Mason, CPA/PFS, CFP, ECA, Jake Northrup, CFP, CFA, CSLP and Candace Lee, CFP®, EA* • Opportunities in Strategy and Operations - *Edgar Collado & Shaun Kapusinski* • *Increasing Access to Financial Planning - Brent Weiss, CFP® , ChFC®*
1:00 PM–1:15 PM	Break
1:15 PM–2:15 PM	**General Session - The people in your practice: Soft skills essential for every financial professional** *Nathan Astle, M.S., LMFT-T*
2:15 PM–3:00 PM	**One-on-one and small group networking**

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Friday, August 13

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9:00 AM–9:30 AM	**Unlock Your Heart – Yoga & Meditation** *Scott Murphy with American Heart Association*
9:30 AM–10:00 AM	Break
10:00 AM–10:15 AM	**Welcome & Kick-off Day 2**
10:15 AM–11:15 AM	**General Session - Diversity and Inclusion at FPA: A Call for Unity and Allyship** *Panel Discussion led by Christopher Woods CFP®, CKA® and Lisa A.K. Kirchenbauer, CFP®, RLP®*
11:15 AM–11:45 AM	Break | **Visit the partners powering this event in the exhibit hall!**
11:45 AM–12:45 PM	**Concurrent Breakout Sessions** • Own Your Future: Marketing for Financial Planners in 2021 -*Jacqueline Schadeck, CFP®, AWMA®* • Maximize Your Mastermind - *Tess Downing, MBA, CFP®* • Opportunities in Academia – *Martin Seay, Ph.D., CFP®* • Business Development When You're Not a "Sales Person" - *Marianela Collado, CPA/PFS, CFP®*
12:45 PM–1:00 PM	Break
1:00 PM–2:00 PM	**Closing General Session - Be the Change: The Power of You** *Tyrone V. Ross Jr.*

This schedule is subject to change.