FPA Central Virginia Forum 2022

June 9-10, 2022

Thursday, June 9, 2022

Thurs, June 9, 2022	General Session	Speaker	Firm	Topic	Description
8:00 am- 8:30 am	Registration/Breakfast				
8:30 am - 8:35 am	Opening Remarks	Ben Raikes, President, FPA Central Virginia			
8:35 am - 9:35 am	Session 1	David Rutherford, Vice President, National Speaker and Performance Coach	First Trust	Team Life	Every great individual in history as made a comprehensive commitment toward living a team-oriented lifestyle to achieve elite levels of success. Not many teams have had as great a sucess in the U.S. Navy SEAL Teams. The Teams thrive on an extreme standard of performance determined by over 80 years of operations and training doctrine forged on battlefields around the world.
9:35 am - 10: 35 am	Session 2	Dr. Bill Lloyd, MD FACS Health Director, Transamerica Advanced Markets	TransAmerica	Beyond Pandemic: Lessons Learned and Essential Next Steps	Americans have endured extraordinary challenging times that threatened their family life, their precious health, their worklife/career goals, as well as their current and future financial security. Many see the end of the COVID-19 pandemic as a springboard opportunity to reset life goals and to better prepare for the future. Failure to imagine a better life simply guarantees, at best, more of the same. This presentation builds on lessons that emerged from the pandemic and introduces smart strategies individuals can implement that will elevate their family's financial and physical well-being.
10:35 am - 10:45 am	BREAK				
10:45am - 11:45am	Session 3	Bobby Henebry, CFA®, Founder of HBCC, LLC	Founder, HBCC LLC	Understanding Cryptocurrencies and Financial Planning Considerations	The blockchain/cryptocurrency market is ever-evolving. Bobby will begin with the ideology behind Bitcoin and transition to how the rest of the crypto ecosystem is evolving, NFTs, custody concerns, tax considerations, regulation, the range of investment options and structures, as well as investment themes.
11:45am - 12:30pm	LUNCH	Jame Wilson	Riskalyze	Introduction	
12:30pm - 1:30pm	Session 4	Linda Duessel, CFA®, CPA, CFP® Senior Equity Strategist, Senior Vice President, Federated Hermes	Federated Hermes	Economic & Market Outlook: It Depends on Your Time Horizon	The presentation looks at the short and long-term economic & investment implications of the COVID-19 pandemic. The strength of businesses and consumers going into the crisis, along with unprecedented monetary and fiscal stimulus, has surprised in terms of America's speed of economic and profits recovery. Longer term, Modern Monetary Theory may become policy, with major implications. Finally, the presentation looks at US demographics, with the massive Millennial generation reaching their prime productivity years. The future may be challenging or bright, but it will be interesting!
1:30pm - 2:30pm	Session 5	Mary Morris, Virginia529 CEO	Virginia 529	Coming Soon: Virginia State-Facilitated Retirement Program	In 2021, the Virginia General Assembly passed legislation directing Virginia529 to establish a state-facilitated private retirement program. RetirePath Virginia will address existing gaps and inequities by expanding access to retirement savings and providing more Virginians with a path to economic security. This session will provide an overview of RetirePath Virginia, scheduled to launch in July 2023, and explore opportunities for financial professionals.
2:30pm - 2:40pm	BREAK				

2:40pm - 3:40pm	Session 6	Jeff Hybiak CFA®, Senior Portfolio Manager, Chief Operating Officer	SEM Wealth Management	Navigating Uncertainty with Confidence	In today's digital age we are bombarded with messages containing confident predictions about what will happen to the economy and the markets. This can lead to many behavioral biases which are hazardous to our investment recommendations. As financial advisors it's important to remove our own biases. One of the best ways to do this is by following a rules based approach. This presentation will discuss some of the obstacles the markets are facing in the years ahead, some possible investment rules you can apply to your portfolios, and a way to create a truly diversified investment portfolio for your clients.
3:40pm - 4:30pm	Session 7	Bryan Gay, Owner Boomer Insurance Group	Boomer Insurance	Why is Medicare so Complicated?	Ready to de-mystify Medicare? Bryan can help navigate the complexities around Medicare to help your clients make the best decision for their health care needs and their financial concerns.
4:30pm - 5:30pm	Happy Hour	Lewis Williams, Senior Vice President, Senior Regional Consultant, Federated Hermes	Federated Hermes		

Friday, June 10, 2022

Fri, June 10, 2022	General Session	Speaker	Firm	Topic	Description
8:00am- 8:30 am	Registration/Breakfast				
8:30am - 8:35am	Opening Remarks	Ben Raikes, FPA			
8:35 am - 9:35 am	Session 1	Jeff Levine CPA/PFS, CFP® , AIF, CWS, MSA	Kitces	How the SECURE Act Changes Retirement (and Other) Planning	In this session, attendees will learn about each of the major changes made by the SECURE Act, what we've learned in the past couple years dealing with the SECURE Act, and explore both the new challenges, and planning opportunities, it creates.
9:35 am - 10: 35 am	Session 2	Jeff Levine CPA/PFS, CFP® , AIF, CWS, MSA	Kitces	Advanced Roth Planning- How to Squeeze More Juice Out of the Tax Lemon	A core concept of tax planning is to pay taxes at the lowest rates. But what will your clients' tax rates be when they need to access their retirement funds? That unknown is a major risk for many retirees, but it is a risk that a Roth IRA conversion can help to reduce and/or eliminate. In this session attendees will gain an understanding of critical Roth conversion rules, as well as some of the advanced conversion strategies that practitioners can use to help clients transition as much money as possible from tax-deferred accounts to tax-free accounts at the lowest cost.
10:35 am - 10:45 am	BREAK				
10:45am - 11:45am	Session 3	David Houston, JD Director of Advanced Strategies	RiverSource, a subsidiary of Ameriprise Financial	Plan to Give More, Estate Planning Strategies to Take Care of What Matters Most	What is in your Estate? How will your assets be used when you are no longer here? Would you like to reduce income taxes so you can leave more? Are there better alternatives?
11:45am - 12:30pm	LUNCH				
12:30pm - 1:30pm	Session 4	Margaret Dorn, Senior Director, Head of ESG Indices, North America	S&P Dow Jones Indices	ESG Investments	
1:30pm -2:00 pm	Break/Mini Happy Hour				
2:00 pm - 4:00 pm	Session 5	Melissa Kemp CFP®, AEP®, CAP®, CNAP®		The Updated CFP® Board of Standards New Ethics Course	We'll discuss what goes on in someone's mind that allows them to think they can go undetected while committing a fraudulent act. What are the common set of thinking errors and patterns that each of us can be susceptible to on a regular basis. Common ethical dilemmas that advisors face in today's workplace.
4:00 PM	Closing Remarks	Ben Raikes, FPA			