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**				**Please enjoy breakfast and visit our sponsors!**
8:30 am - 8:35 am	Opening Remarks - Ben Raikes, President, FPA Central Virginia				
8:35 am - 9:35 am	Session 1	David Rutherford, VP, National Speaker and Performance Coach	First Trust	Team Life	Every great individual in history has made a comprehensive commitment toward living a team-oriented lifestyle to achieve elite levels of success. Not many teams have had as great success as the U.S. Navy SEAL Teams.
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 extraordinarily challenging times that have threatened not only their financial security but their way of life. Many see the end of the COVID-19 pandemic as a springboard opportunity to reset life goals and to better prepare for the future. 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**				**Visit our Sponsors!**
10:45 am - 11:45 am	Session 3	Bobby Henebry, CFA®, Founder of HBCC, LLC	HBCC, LLC	Understanding Cryptocurrencies and Financial Planning Considerations	The blockchain/cryptocurrency market is ever-evolving. This presentation will discuss the ideology behind Bitcoin, NFTs, custody concerns, tax considerations, regulation, the range of investment options/structures, as well as investment themes.
11:45 am - 12:30 pm	**LUNCH and a presentation from James Wilson with Riskalyze**				**Enjoy lunch and a presentation from Riskalyze!**
12:30 pm - 1:30 pm	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	This 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.
1:30 pm - 2:30 pm	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.
2:30 pm - 2:40 pm	**BREAK**				**Visit our Sponsors!**
2:40 pm - 3:40 pm	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.
3:40 pm - 4:30 pm	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.
4:30 pm - 5:30 pm	**Happy Hour! Sponsored by Federated Hermes and Lewis Williams**				**Please enjoy our happy hour event!**

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Friday, June 10, 2022

Fri, June 10, 2022	General Session	Speaker	Firm	Topic	Description
8:00 am- 8:30 am	**Registration/Breakfast**				**Please enjoy breakfast and visit our sponsors!**
8:30 am - 8:35 am	Opening Remarks - Ben Raikes, President, FPA Central Virginia				
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? 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**				**Visit our Sponsors!**
10:45 am - 11:45 am	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?
11:45 am - 12:30 pm	**LUNCH**				**Please enjoy lunch and visit our sponsors!**
12:30 pm - 1:30 pm	Session 4	Margaret Dorn, Senior Director, Head of ESG Indices, North America	S&P Dow Jones Indices, a division of S&P Global	Differentiating your Value Proposition with the Evolution of ESG Investing	ESG investing has transitioned from the margins to the mainstream and it is a factor that not only can impact the outcome of client investment objectives, but allow wealth planners to differentiate themselves in today's competitive environment. Gaining a firm grasp on how ESG factors have matured, best practices on discussing ESG investing with clients, and implementing precise points of view in client portfolios is critical towards the next decade of client servicing and business growth.
1:30 pm -2:00 pm	**Break/Mini Happy Hour**				**Please enjoy our happy hour event!**
2:00 pm - 4:00 pm	Session 5	Melissa Kemp CFP®, AEP®, CAP®, CNAP®	FPA	CFP Board of Standards Ethics [Mandatory] Course - Updated in 2020	This program fulfills the requirements for CFP® Board approved Ethics CE. The program is designed to educate CFP® professionals on the CFP® Board's new Code of Ethics and Standards of Conduct, which became effective October 1, 2019 and has been updated in 2020, for rollout to CFP® professionals as of April 1, 2021.
4:00 pm	Closing Remarks - Ben Raikes, President, FPA Central Virginia				**Enjoy your weekend!**