



FINANCIAL
PLANNING
ASSOCIATION

MICHIGAN

FPA of Michigan 2022 Annual Symposium
September 22nd and 23rd | L.V. Eberhard Center in Grand Rapids, Michigan

Agenda

Thursday, September 22nd:

10:00 am to 11:00 am: Registration/Visit with Partners

11:00 am to 11:10 am: Welcome/Opening Remarks

11:10 am to 12:10 pm: **Creating Greater Value With Time**

Presented by Dennis Moseley-Williams

This presentation does not qualify for CFP CE's

About the presentation: How do you change time so that it's more valuable for your client? The answer lies in understanding the difference between the convenience of service vs. the value of experience. Do you save time for your clients through ease and efficiency, or do you create time well spent through experiences that are memorable, meaningful, and engaging? In essence, you change how they perceive the value of time.

In **Creating Greater Value With Time**, Dennis Moseley-Williams explores ways to change how your clients perceive time spent with you. All work is theatre, and every business is a stage, including yours. Advisors everywhere are competing for time, attention, and money. Using three distinct examples, Dennis shows that when you give your clients a reason to form an emotional connection with your business, they will want to spend more time with you. And when they do, they will become more loyal, will pay you more, and will tell more people about you.

What you will learn:

- The difference between service vs. experience and why efficiency is overrated
- How great companies stage better experiences and create "time well spent"
- How to compete and win your clients' time, attention and money
- The 5 phases of an experience and how to use them to your advantage
- Why experience works, is more fun, meaningful and fulfilling for you and your clients.

12:10 pm to 1:00 pm: Lunch

**1:00 pm to 1:50 pm: Simplified or Just Differently Complicated?
Estate Planning with Retirement Assets in a Post-SECURE World
Presented by Robert M. Huff, Attorney of Varnum
This presentation has been approved for 1 CFP CE**

About the presentation: In December 2019, the SECURE Act passed on bipartisan grounds to provide clarity and direction with regard to the management of retirement assets. However, since that time, Congress has debated the passing of follow-up legislation dubbed SECURE 2.0, suggesting that the original SECURE Act left some openings that still needed to be addressed. In this presentation, we'll address the current state of the law regarding retirement assets and where SECURE 2.0 might take things in the future.

What you will learn:

- Understand the current laws in force regarding required minimum distributions in the hands of a beneficiary of a retirement plan
- Appreciate the remaining tax deferral opportunities for retirement asset beneficiaries
- Understand the issues that estate planning attorneys address with clients regarding retirement assets
- Appreciate the possible impact of SECURE 2.0 on retirement asset planning

**2:00 pm to 2:50 pm: JP Morgan – A Guide to the Markets
More information coming soon!**

**3:10 pm to 4:00 pm: Will Real Estate Values Continue to Rise?
Presented by Glenn R. Mueller, Ph.D.
Research Consultant for ARES Capital Management Group
This presentation has been approved for 1 CFP CE**

About the presentation: Strong market fundamentals – including low vacancy rates, increasing rental rates and balanced supply and demand – have potentially positioned commercial real estate for continued growth. Join Ares Wealth Management Solutions, LLC (WMS) as we discuss the market outlook for commercial real estate and uncover why we believe commercial real estate will continue to be an attractive asset class for investors.

What you will learn:

- Potential benefits of income producing commercial real estate as a part of a diversified client portfolio
- Where commercial real estate in the market cycle
- Factors that drive real estate valuations
- Historical returns of commercial real estate

**4:10 pm to 5:10 pm: Jacki Wilke of First Trust
Topic: High Risk, High Reward: Women | Nex
More information coming soon!**

5:10 pm to 6:30 pm: Cocktail Reception

Friday, September 23rd:

8:00 am to 8:30 am: Continental Breakfast/Visit with Partners

8:30 am to 9:30 am: The Future of Money

Presented by Leon LaBrecque, JD, CPA, CFP®, CFA

This presentation has been approved for 1 CFP CE

About the Presentation: In this new decade of pandemic-induced change, there is unprecedented global fiscal and monetary stimulus, combined with prospective changes in the Newly Ordered World. In this session, Leon LaBrecque, JD, CPA, CFP®, CFA will present some of the questions of money as we move forward. Topics include:

- The ascendancy and decline of prior economic empires. When will China become the dominant economic power? What does this mean to the US, and more specifically, to money and planning?
- The movement of crypto and blockchain. Is crypto the new currency, or worthless? Is blockchain independently valuable and if so, how can financial planners incorporate these technologies into portfolios?
- The Fed has a leviathan balance sheet with \$9 Trillion of assets. How will a 'let off' work?
- Inflation has taken on a new complexion, adding asset-based and service-based inflation. What will this mean in the near future?

Leon LaBrecque has practiced for 45 years. He's the former chair of Walsh College's Department of economics and finance, serves on an advisory Board for the Chicago Fed, is a prior board member of the MICPA and a frequent columnist for Forbes.com. Be prepared for a provocative and mind-expanding (not 70s style) conversation.

What you will learn:

- What are the main factors of historical ascendancy of economic hegemony?
- Where is the US and China in the historical models?
- What are the potential outcomes of crypto and blockchain?
- What are options for the Fed to 'let-off' its \$9T balance sheet?
- What does inflation look like going forward? How will asset inflation plus service-based inflation change the future

9:30 am to 10:20 am: Table Topics - Round Table Discussions

Interactive Session

This presentation does not qualify for CFP CE's

The last two years have been challenging for planners and their practices. We have so much experience together in one room. It would be terrible if we did not leverage that experience and learn from one another. The purpose of Table Topics is to pose fun and engaging questions to the group that are relevant to our industry, clients, and practice management. A moderator will pose a question to the room. Over a few minutes, each table will discuss the topic and appoint someone to share the table's "best practice" to the room. The goal is to create one on one communication with the table while also learning best practices from every table in the room. We will cover as many topics as possible during the allotted time so we may learn from one another. The goal would be to cover one question in 10-12 minutes.

10:40 am to 11:30 am: Beverly Flaxington

Topic: Deepening Client Relationships Using the Lens of EQ

More information coming soon!

11:30 am to 12:00 pm: Lunch

12:00 pm to 12:50 pm: Dimensional Fund Advisors

Topic: ETF

More information coming soon!

1:00 pm to 2:00 pm: Ask Michael Anything

Presented by Michael Kitces

This presentation does not qualify for CFP CE's

Join us for an Ask Michael Anything session. This is a unique opportunity to tap into the vast knowledge set of Michael Kitces, publisher of the popular financial planning industry blog *Nerd's Eye View*. As the Chief Financial Planning Nerd for Kitces.com, Michael enjoys helping financial advisors implement smart financial planning strategies while growing their financial advisory firms. During this session, Michael will be ready to address the questions at the forefront of your mind real time. ***So come prepared to ask your most pressing questions "live" with Michael!***

2:00 pm to 2:15 pm: Closing Remarks/Symposium Concludes

**Please note: This Agenda is subject to change at the discretion of the FPA of Michigan Symposium Committee.*