



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: Guide to the Markets: Investment Outlook  
Presented by Jordan Jackson, Vice President, Global Strategist  
on the J.P. Morgan Asset Management Global Market Insights Strategy Team  
This presentation has been approved for 1 CFP CE**

**About the presentation:** The Market Insights team and Guide to the Markets publication aim to simplify the complex with timely and thought-provoking insights on market events and outlook to help investors make informed investment decisions more confidently.

**What you will learn:**

- When will the next US recession begin, if it hasn't already? How severe will the recession be?
- What do we expect for inflation over the rest of this year and next year?
- What is the outlook for politics headed into the November midterms?
- Will the S&P 500 rise or fall from current levels?
- What do we expect from the Federal Reserve and Fixed Income?
- How to position a multi-asset portfolio today?

**2:50 pm to 3:10 pm: Break/Visit with Partners/Visit with FPA MI Board and Committee Members**

**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: At Risk, High Reward: Women, Next Gen, Multi-generational Families**  
*Presented by Jackie Wilke, Vice-President, Advisor Consultant*  
*First Trust*

**This presentation has been approved for 1 CFP CE**

**About the presentation:** The needs, preferences and priorities of investors are evolving—especially for women, new generations of HNWI's and multi-generational families—as access to information, investments and resources continues to be democratized and commoditized. High-performing, future-focused professionals are differentiating by delivering relevant value to their target audience with Process, Planning and People. From the client experience, fostering deeper client relationships, delivering holistic service, leveraging technology, serving families and more. This presentation brings you their innovative, high-return practices for a modern client experience and business development processes.

**What you will learn:**

- Why the landscape is different when engaging today's investor, especially those building wealth, inheriting wealth, controlling wealth (women, next gen)
- How to invest in what you can control (experiences, the narrative) to articulate and deliver value that is relevant to these target audiences
- The high tech, high touch, hybrid processes to stack your communication and leverage multiple-channels to attract your target audience regardless of geography
- How to activate clients as sources for referrals and introductions by offering resources to those most important to them
- How to leverage educational marketing and events (with ideas for content and events)
- How to implement the Family Phone Call for a warm, proactive introduction to client's multi-generational families to fortify what you've built and identify prospects in the family tree

**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 9:20 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: Deepening Client Relationships Using the Lens of EQ**

*Presented by Beverly Flaxington, MBA*

*The Human Behavior Coach®*

**This presentation has been approved for 1 CFP CE**

**About the presentation:** Well-known analytical industry sources now concede that an excellent advisor needs to possess as much "EQ" in delivering planning and investment structure, as IQ. Behavioral aspects and attitudes toward finance

and the underlying biases investors have, and bring to their planners, can disrupt the relationship and take excellent planning off track.

This session will look through the lens of EQ for the planner and helps advisors understand how their own stress levels impact their relationships with clients. Advisors will learn strategies for handling communication with clients, especially during difficult market and economic environments such as the one we are experiencing now.

The result will be for advisors to gain insight and knowledge to help clients navigate difficult markets and continue to stay focused on their long-term plans rather than act from a fear-based, emotional perspective.

**What you will learn:**

- Recognize the significance of EQ for the advisor
- Recognize the application with the client and how to modify for greater understanding
- Identify the signals clients give off when they are stressed or worried
- Apply strategies to work through stress and concern and behavioral bias especially in difficult market times
- Become adept at delivering a “planning” message to assuage fears during difficult market conditions

**10:20 am to 10:30 am: Break/Visit with Partners/Visit with FPA MI Board and Committee Members**

**10:30 am to 11:30 am: Table Topics - Round Table Discussions**

***Interactive Session***

**This presentation does not qualify for CFP CE's**

**About the session:** 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.

**11:30 am to 12:00 pm: Lunch**

**12:00 pm to 12:50 pm: Evolution of the ETF Industry**

***Presented by Kristi Higgins, a member of***

***Dimensional's Investment Solutions Group with a specialization in ETF's***

**This presentation has been approved for 1 CFP CE**

**About the presentation:** Since the launch of the first ETF in 1993, the industry has exploded to over \$7tn in AUM, nearly 3000 strategies, and more than 200 managers. With the proliferation of strategies and providers, financial professionals must learn to cut through the noise to make the best investment

decisions for their clients. In this session, we dig into the evolution of the ETFs and how Dimensional is leading the industry forward with systematic ETFs that provide the benefits of indexing, but go beyond that with higher expected returns and flexible implementation. Join us for this can't-miss conversation John Morrison, Senior Investment Strategist & VP of Dimensional Fund Advisors.

**What you will learn:**

- The evolution of the ETF industry with a focus on recent trends.
- The power of flexibility given the new ETF rule.
- The proliferation of factor-based investment strategies.  
Dimensional's entrance into the ETF industry and how they are driving the industry forward.

**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.***