2023 FPA DFW Conference | Wednesday, February 8

START	END	
12:00 PM	2:00 PM	**CFP Code of Ethics & Standards of Conduct (GoToWebinar)**
CFP® ETHICS CLASS		**CFP Ethics: CFP Board's Revised Code and Standards** Darin Shebesta, CFP®, AIF®, CAP® - VP, Jackson/Roskelley Wealth Advisors, Inc. This course qualifies for 2 CFP Ethics CE - Does not qualify for TDI/Insurance Ethics
5:00 PM	7:00 PM	**FPA DFW Pre-Con Reception I Bar Louie Las Colinas I Powered by:** FIDELITY Charitable®

2023 FPA DFW Conference | Thursday, February 9

START	END			
7:00 AM	8:00 AM	**DOORS OPEN I REGISTRATION I BREAKFAST I MEET & GREET WITH SPONSORS**		
START	**END**			
8:00 AM	9:30 AM	**Financial Planning at the End of Life** Carolyn McClanahan, M.D., CFP® I Founder I Life Planning Partners, Inc. 1.5 CE: CFP, CPA, CIMA, NAPFA + 1 TDI (Sircon)		
9:30 AM	9:45 AM	**NETWORKING BREAK WITH SPONSORS**		
START	**END**	**MAVERICKS**	**STARS**	**RANGERS**
9:45 AM	10:35 AM	**The Future of Financial Planning: 5 Trends Changing the Way You Do Business** Alan Moore, MS, CFP® CEO & Co-Founder I XY Planning Network 1 CE: CFP, CPA, CIMA, NAPFA	**Tax Strategies for Financial Advisors** Pearl Balsara, CPA Senior Tax Manager I HM&M 1 CE: CFP, CPA, CIMA, NAPFA	**Personal Liability Risk & Holistic Wealth Management** Tony Boyd, CIC, AFIS I Hub International Personal Insurance & Mark Buisson, CIC, CRM, CPRM I PURE Group of Insurance Co.'s 1 CE: CFP, CPA, CIMA, NAPFA, TDI (Sircon)
10:35 AM	10:50 AM	**MORNING NETWORKING BREAK WITH SPONSORS**		
10:50 AM	11:40 AM	**Wealth Preservation & Transfer Strategies for Multi-Generational Families** Jana Simons, LL.M., J.D., M.S.,CFP® Associate I Meadows Collier Attorneys at Law 1 CE: CFP, CPA, CIMA, NAPFA	**Are You Happy Now? Planning For the Present Rather Than the Unpredictable Future** Carolyn McClanahan, M.D., CFP® Founder I Life Planning Partners, Inc. 1 CE: CFP, CPA, CIMA, NAPFA	**FinTech: The Truth About the Future of the Financial Advisor** Matt Reiner, CFA, CFP® CEO & Co-Founder I Benjamin 1 CE: CFP, CPA, CIMA, NAPFA
11:40 AM	12:15 PM	**NETWORKING LUNCH WITH PARTNERS I GRAND BALLROOM I DFW President's State of the Chapter Remarks**		
12:15 PM	1:05 PM	**The Capital Markets & the Macroeconomic Environment: A View from 40,000 Feet** Robert (Bob) Phipps I Director, Partner I Per Stirling Capital Management, LLC 1 CE: CFP, CPA, CIMA, NAPFA		
1:05 PM	1:20 PM	**NETWORKING BREAK WITH SPONSORS**		
1:20 PM	2:10 PM	**Charitable Planning Essentials to Grow Your Business** Nathan Daley, VP I Head of Complex Cases Michael Wilson I Regional Philanthropic Consultant Fidelity Charitable 1 CE: CFP, CPA, CIMA, NAPFA	**Planning for Closely-Held Businesses (Part I)** Gary A. Zwick, J.D., LL.M., CPA (inactive), AEP Partner I Walter Haverfield, LLP 1 CE: CFP, CPA, CIMA, NAPFA	**Helping Clients Plan for Solo Aging: Holistic Life Planning Beyond Finances** Carol Marak Author & Coach at Carol Marak, LLC 1 CE: CFP, CPA, CIMA, NAPFA
2:10 PM	2:25 PM	**AFTERNOON REFRESHMENT BREAK WITH SPONSORS**		
2:25 PM	3:15 PM	**Blockchain Money - The Present & Future of Investing** Sonia Dumas, CPA CEO I Curio Haus 1 CE: CFP, CPA, CIMA, NAPFA	**Planning for Closely-Held Businesses (Part II)** Gary A. Zwick, J.D., LL.M., CPA (inactive), AEP Partner I Walter Haverfield, LLP 1 CE: CFP, CPA, CIMA, NAPFA	**The Feeling Isn't Mutual: Why Advisors Are Choosing ETFs Over Mutual Funds & How SMAs Compare** Philip McInnis Chief Investment Strategist I Avantis Investors® 1 CE: CFP, CPA, CIMA, NAPFA
3:15 PM	3:25 PM	**MINI TRANSITION BREAK**		
3:25 PM	3:40 PM	**DOOR PRIZE DRAWINGS I ANNOUNCEMENTS I GRAND BALLROOM**		
3:40 PM	5:00 PM	**Mastering Empathy & Authentic Communication** Courtland Warren - CEO I OptEffect, LLC 1.5 CE: CFP, CPA, CIMA, NAPFA		
5:00 PM	6:30 PM	**Post Conference Reception I Powered by:** Protective		