FPA Central Virginia Forum 2023

June 8 - 9, 2023

Thursday, June 8, 2023

Thurs, June 8, 2023	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 - Kate Atwood, President, FPA Central Virginia				
8:35 am - 9:35 am	Session 1 **Keynote Speaker**	Stephen B. Long, Ph.D	University of Richmond	Global Security Threats and the Potential Impact on Investing and the Economy	Major discussion points will be Russia's invasion of Ukraine, Iran and North Korea, the South China Sea and Taiwan. These threats will be ranked and discussed in detail. There will also be discussion about how these threats could impact investments and the economy.
9:35 am - 10: 35 am	Session 2	Jeff Hybiak, CFA® Chief Investment Officer Chief Operating Officer	SEM Wealth Management	A Behavioral Approach to Economic Analysis	Economics courses tend to work off models created in academic circles which do not necessarily work in the real world. As advisors it is important to understand what really drives the economy as well as what it means for our investment allocations and expectations. In this session we will walk through what the data says are the best leading economic indicators as well as the commonsense logic as to why they work.
10:35 am - 10:45 am	**BREAK**				**Visit our Sponsors!**
10:45 am - 11:45 am	Session 3	Linda A. Duessel, CFA®, CPA, CFP® Senior Vice President Senior Equity Strategist	Federated Hermes	Modern Monetary Theory - How It Became Policy	The presentation looks at the fallout from an election which divided the nation. Massive government stimulus is fueling a growing debt bubble, with more spending proposed, despite a much stronger-than-expected recovery. Is hyperinflation in sight? And how does all this debt affect long-term growth? Has Modern Monetary Theory become Policy? Is it a good idea? You need only answer one question—do you trust politicians to rein it all in when inflation does become a problem.
11:45 am - 12:30 pm	**LUNCH**				**Enjoy lunch and visit with our Sponsors!**
12:30 pm - 1:30 pm	Session 4	Linda A. Duessel, CFA®, CPA, CFP® Senior Vice President Senior Equity Strategist	Federated Hermes	Cryptocurrencies Demystified	Bitcoin has been around since 2008, but its price, size in the market, and transaction volume has exploded in just the last few years. Increasingly, investors and their advisors are asking whether Bitcoin should be held in portfolios. This presentation explains the concept, and many others that are important to understand, as well as opportunities and risks in cryptocurrencies in general, and Bitcoin in particular.
1:30 pm - 2:30 pm	Session 5	Bryan Gay	Boomer Insurance	The Psychology of Medicare	Bryan discusses not only the traditional aspects of Medicare such as the costs and coverage but also dives deeper into what health care can mean to our clients.
2:30 pm - 2:40 pm	**BREAK**				**Visit our Sponsors!**
2:40 pm - 3:40 pm	Session 6	Ryan Bertrand, CFP®, CLU Managing Director of Advanced Markets	Transamerica	Marriage and Money: Financial Considerations for Spouses	Most married couples disagree about when they will retire, how much they should have saved and their lifestyle expectations in retirement. This presentation reviews the key financial considerations advisors should review for married couples as they begin their retirement years.
3:40 pm - 4:30 pm	Session 7	Emily Chiang, CFP® Founder and Owner	Succession Planning, LLC	A Step-by-Step Succession Planning Process and Procedure	Many of today's current financial advisors plan to retire within the next 10 years. However, the majority of them have either no plan at all or only "some form" of plan in place. This presentation reviews the steps needed to ask the right questions and formulate a successful succession plan.
4:30 pm - 6:00 pm	**Happy Hour! Sponsored by Ameriprise**				**Please enjoy our happy hour event!**

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Friday, June 9, 2023					
Fri, June 9, 2023	**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 - Kate Atwood, President, FPA Central Virginia				
8:35 am - 9:35 am	Session 1	Jeff Levine CPA/PFS, CFP® , AIF, CWS, MSA Lead Financial Planning Nerd	Kitces	Using Trusts as IRA Beneficiaries	The use of trusts in estate planning is becoming increasingly popular for both tax and non-tax reasons making the use of trusts as beneficiaries of IRAs increasingly desirable and necessary. In this session, we will explore the unique requirements for IRAs to preserve and maximize their tax deferral after death when a trust is the beneficiary of a retirement account.
9:35 am - 10: 35 am	Session 2	Jeff Levine CPA/PFS, CFP® , AIF, CWS, MSA Lead Financial Planning Nerd	Kitces	Estate Planning for Income Taxes: Maximizing Step-Up In Basis for Couples	Given recent changes in the law, “tax planning” for one’s estate at death has become a lot less about estate *tax* planning, and far more about the *income* tax planning. Attendees of this session will explore topics including how pre-death asset transfers can help maximize step-up in basis, how other types of pre-death transfers can help avoid the potential for a step-down in basis and the complications associated with these strategies.
10:35 am - 10:45 am	**BREAK**				**Visit our Sponsors!**
10:45 am - 11:45 am	Session 3	John D. Ellison, CFA® Managing Member	Richmond Quant	Using the Endowment Toolset to Level-Up Client Portfolios	This presentation will review the endowment approach to investing and how adding core components of this approach to your clients' investment strategy can lead to better experiences for your clients and provide better overall outcomes.
11:45 am - 12:30 pm	**LUNCH**				**Please enjoy lunch and visit our sponsors!**
12:30 pm - 1:30 pm	Session 4	Mary Morris, CEO of Virginia529	Virginia529	Tuition Track Portfolio	In this presentation Mary discusses the Tuition Track portfolio as offered by Virginia529. Attendees will leave this presentation with a better understanding of the pros and cons of the Tuition Track portfolio and how it can be implemented for clients.
1:30 pm - 2:30 pm	Session 5	Marshall Chambers, CFP®, CFA and Cary Baronian, CFA	Heritage Wealth Advisors	Charitable Gifting Strategies & Managing the Charitable Portfolio	In this presentation attendees will learn about various charitable gifting strategies including which one is right for your client and how to best implement them. Strategies discussed will include foundations, trusts, donor advised funds and more. Special guidance on the management of these strategies will also be discussed.
2:30 pm - 2:45 pm	**SPECIAL BREAK**				**Please enjoy some refreshments!**
2:45 pm - 3:45 pm	Session 6 **Keynote Speaker**	Preston D. Cherry, Ph.D, CFP®, Founder and President	Concurrent Financial Planning	Spend Shame to Spend Success: A Modern Life Stage Dialogue	Dr. Cherry discusses how the psychology of spending can affect our financial lives and well-being. In this presentation Dr. Cherry reviews how advisors can empower their clients by learning to understand their psychological connection to money and their saving and spending habits.
3:45 pm	Closing Remarks - Kate Atwood, President, FPA Central Virginia				**Enjoy your weekend!**