2024 FPA DFW Conference | Wednesday, February 14

12:00 PM	2:00 PM	CFP Code of Ethics & Standards of Conduct (GoToWebinar)
3:30 PM	5:30 PM	FPA DFW Pre-Con Reception I Bar Louie Las Colinas I Powered by: xypn XY PLANNING NETWORK

2024 FPA DFW Conference | Thursday, February 15

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	**Crafting a Retirement Income Plan** Robert Powell, CFP®, RMA® I Columnist, Retirement I MarketWatch 1.5 CE: CFP, CPA, CIMA, NAPFA		
9:30 AM	9:45 AM	NETWORKING BREAK WITH SPONSORS		
START	**END**	**MAVERICKS**	**STARS**	**RANGERS**
9:45 AM	10:35 AM	**Special Needs Trusts: Planning for Families with Special Needs Children** Tresi Weeks, J.D., CAP Attorney & Founder I The Weeks Law Firm, PLLC 1 CE: CFP, CPA, CIMA, NAPFA	**Financial Planning for Newly Widowed Clients** Chris Bentley, CFP®, CRPC®, CLU, BFA, MBA Founder & CEO IWings for Widows 1 CE: CFP, CPA, CIMA, NAPFA	**Planned GIving: Fun with Taxes & Probate** Jennifer Lehman, Ph.D., J.D., CFP®, CAP® Program Dir., Wallace Chair, & Asst. Professor The American College of Financial Services 1 CE: CFP, CPA, CIMA, NAPFA
10:35 AM	10:50 AM	MORNING NETWORKING BREAK WITH SPONSORS		
10:50 AM	11:40 AM	**Advanced Education Planning: From 529 Plans to Student Loan Forgiveness** Ross Riskin, DBA, CPA/PFS, CCFC®, MS Tax Chief Learning Officer I Investments & Wealth Institute 1 CE: CFP, CPA, CIMA, NAPFA	**Life Insurance 101: Case Studies on Product, Policy Service, and Best Practices** Anne Jones & Bianca Admire, CFP® Artemis Partners 1 CE: CFP, CPA, CIMA, NAPFA, TDI (Insurance)	**Find Your Niche: Define & Differentiate to Compete in a Highly Competitive Environment** Practice Management
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	**Keynote session** 1 CE: CFP, CPA, CIMA, NAPFA		
1:05 PM	1:20 PM	NETWORKING BREAK WITH SPONSORS		
1:20 PM	2:10 PM	**Nothing is Ever What it Seems: An Overview of Disregarded Entities** Jana L. Simons, J.D., LL.M., CFP® Meadows, Collier, Reed, Cousins, Crouch & Ungerman, LLP 1 CE: CFP, CPA, CIMA, NAPFA	**Tax Strategies & Implementation for Financial Planners** John Langston, CPA Tax Partner I Saville CPA's & Advisors, LLC 1 CE: CFP, CPA, CIMA, NAPFA	**Protecting One of Your Client's Greatest Assets - Their Income** Jason Loveless Principal I JCL Solutions Group, LLC 1 CE: CFP, CPA, CIMA, NAPFA, TDI (Insurance)
2:10 PM	2:25 PM	AFTERNOON REFRESHMENT BREAK WITH SPONSORS		
2:25 PM	3:15 PM	**Using Artificial Intelligence (AI) in Wealth Management & Financial Planning** Craig Lemoine University of Illinois & Professor of Financial Planning 1 CE: CFP, CPA, CIMA, NAPFA	**Elder Care & Long-Term Care Planning** Erin W. Peirce Attorney & Partner I Leu, Peirce & Olson 1 CE: CFP, CPA, CIMA, NAPFA, TDI (Insurance)	**Big Ideas: Technological Break-Throughs** Jack Stock, CIMA® VP, Product Specialist ARK Invest I Resolute Investment Managers 1 CE: CFP, CPA, CIMA, NAPFA
3:15 PM	3:25 PM	MINI TRANSITION BREAK		
3:25 PM	3:35 PM	DOOR PRIZE DRAWINGS I ANNOUNCEMENTS I GRAND BALLROOM		
3:35 PM	5:00 PM	**Age, Fear & Uncertainty: How the Client Mindset is Changing the Client Experience** Julie Littlechild - Founder & CEO I Absolute Engagement 1.5 CE: CFP, CPA, CIMA, NAPFA		
5:00 PM	6:30 PM	Post Conference Reception		