### 2024 FPA DFW Conference | Wednesday, February 14

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:00 PM</td>
<td>CFP Code of Ethics &amp; Standards of Conduct (GoToWebinar)</td>
</tr>
<tr>
<td>3:30 PM</td>
<td>FPA DFW Pre-Con Reception I Bar Louie Las Colinas I Powered by:</td>
</tr>
</tbody>
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### 2024 FPA DFW Conference | Thursday, February 15

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda</th>
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<tbody>
<tr>
<td>7:00 AM</td>
<td>Doors Open I Registration I Breakfast I Meet &amp; Greet with Sponsors</td>
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</tbody>
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### PLANED GIVING: FUN WITH TAXES & PROBATE

**Jennifer Lehman, Ph.D., J.D., CFP®, CAP®**
Program Director, Wallace Chair, and Assistant Professor, The American College of Financial Services

- **1 CE:** CFP, CPA, CIMA, NAPFA

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### 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)

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### 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

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### LIFE INSURANCE 101: CASE STUDIES ON PRODUCT, POLICY SERVICE, AND BEST PRACTICES

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### USING ARTIFICIAL INTELLIGENCE (AI) IN WEALTH MANAGEMENT & FINANCIAL PLANNING

**Craig Lemoine**
University of Illinois & Professor of Financial Planning

- **1 CE:** CFP, CPA, CIMA, NAPFA

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### PROTECTING ONE OF YOUR CLIENT’S GREATEST ASSETS – THEIR INCOME

**Jason Loveless**
Principal, JCL Solutions Group, LLC

- **1 CE:** CFP, CPA, CIMA, NAPFA, TDI (Insurance)

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### BIG IDEAS: TECHNOLOGICAL BREAK-THROUGHS

**Jack Stock, CIMA®**
VP, Product Specialist, ARK Invest 
Resolute Investment Managers

- **1 CE:** CFP, CPA, CIMA, NAPFA

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### MINI TRANSITION BREAK

**Door Prize Drawings | Announcements | Grand Ballroom**

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### DOOR PRIZE DRAWINGS | ANNOUNCEMENTS | GRAND BALLROOM