



2024 FPA DFW Conference | Wednesday, February 14

12:00 PM	2:00 PM	CFP Code of Ethics & Standards of Conduct (GoToWebinar) Charles R. Garcia, J.D., CFP® PAX Financial Group
----------	---------	--

3:30 PM	5:30 PM	FPA DFW Pre-Con Reception Bar Louie Las Colinas Powered by:  
---------	---------	---



2024 FPA DFW Conference | Thursday, February 15

7:00 AM	8:00 AM	DOORS OPEN REGISTRATION BREAKFAST MEET & GREET WITH SPONSORS
START	END	

8:00 AM	9:30 AM	Helping Advisors Reimagine Retirement Planning Robert Powell, CFP®, RMA Editor & Publisher, Retirement Daily on TheStreet 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 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 Wings 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 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 Arlene Moss XY Planning Network
----------	----------	---	---	--

11:40 AM	12:15 PM	NETWORKING LUNCH WITH PARTNERS GRAND BALLROOM DFW President's State of the Chapter Remarks
----------	----------	--

12:15 PM	1:05 PM	5 Keys for Investment Success in 2024 and Beyond Peter Perkins Partner & Global Investment Strategist MRB Partners 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 Saville CPA's & Advisors, LLC 1 CE: CFP, CPA, CIMA, NAPFA	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)
---------	---------	---	--	--

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 Leu, Peirce & Olson 1 CE: CFP, CPA, CIMA, NAPFA, TDI (Insurance)	Big Ideas: Technological Break-Throughs Jack Stock, CIMA® VP, Product Specialist ARK Invest 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 ANNOUNCEMENTS GRAND BALLROOM
---------	---------	--

3:35 PM	5:00 PM	Age, Fear & Uncertainty: How the Client Mindset is Changing the Client Experience Julie Littlechild - Founder & CEO Absolute Engagement 1.5 CE: CFP, CPA, CIMA, NAPFA
---------	---------	---

5:00 PM	6:30 PM	Post Conference Reception Powered by:  
---------	---------	---