

27TH ANNUAL SYMPOSIUM



FINANCIAL
PLANNING
ASSOCIATION

HAMPTON ROADS

**Thursday,
September 26, 2024**

**The Westin, Virginia Beach
Town Center**

4535 Commerce St., Virginia Beach, VA 23462

SESSIONS



Ralph Doudera,
CEO, Spectrum
Financial Inc.

Keynote Speaker

Located in Virginia Beach, Spectrum Financial was founded in 1988. In the 36 years since its founding, he has acquired the additional distinction of also serving as portfolio manager of two five-star Morningstar ranked mutual funds. He is the author of *The Wealth Conundrum*, a book on the role of charitable giving in the acquisition and management of wealth.

**WEALTH & THE CLIENT –
KEYS TO CREATING A GREAT
RELATIONSHIP BETWEEN
INVESTORS & THEIR
FINANCIAL RESOURCES**

*Ralph Doudera, CEO &
Head Portfolio Manager
at Spectrum Financial Inc.
& Managing Member of
Hundredfold Advisor LLC*

**A STRATEGY FOR
BUILDING RESILIENT
PORTFOLIOS**

*Kieran Kirwan,
Director, Investment
Strategy & Senior
Investment Strategist
at ProShares*

**FINANCIAL PLANNING—
THE ART OF
TRANSFORMING CLIENTS
FROM PASSIVE TO
ACTIVE PARTICIPANTS**

*Daniel J. Braz, Head
of Intermediary ETF
Strategist Team at State
Street Global Advisors*

**TAXES & THE INVESTOR –
STRATEGIES FOR PAYING
LESS & KEEPING MORE**

*Ron Matthews, CEO
and Founder, Creek
Mountain Partners Inc.,
a venture capital firm*

**ESTATE PLANNING
– AVOIDING THE
COMMON MISTAKES**

*Jennifer Rossettini,
J.D., CFP®, attorney
Hook Law Center*

**REMOVING IRMAA –
STRATEGIES FOR HIGHER
INCOME EARNERS TO
REDUCE MEDICARE
PREMIUMS**

*Bryan Gay, Owner,
Boomer Insurance
Group*

8:00 a.m. • Check-in/Continental Breakfast

8:30 a.m. to 4:30 p.m. • Programs

Speakers and topics are subject to change.

Continuing Education Credits:

**Up to 6 hours CFP, 6 hours CPE (self reported)
and 1 hour Virginia Insurance**

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- \$325 Nonmember

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FPA OF HAMPTON ROADS

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