

FPA of the Triangle's 23rd Annual Fall Symposium: The Evolved Advisor

October 30th, 2025 - McKimmon Center, Raleigh NC

Time	Location	Event	CE
8:00am-8:30am	Main Stage	Registration, Breakfast, Visit Our Sponsors	
8:30am-8:40am	Main Stage	Opening Remarks	
8:40am-9:30am	Main Stage - Keynote	What Clients (Actually) Value Most in a Financial Advisor Evan Beach, Exit 59 Advisory	1 hr CFP & NCDI
9:30am-9:40am	Exhibit Hall	Break and Exhibit Time	
9:40am-10:30am	Main Stage	The Missing Piece in Financial Planning: Property & Casualty Insurance Meaghan Dowd, Holistiplan	1 hr CFP & NCDI
	Breakout Room	Medicare: Beyond Parts A&B and the Impact IRMAA can have on your clients Bryan Gay, Boomer Insurance Group	Pending 1 hr CFP & NCDI
10:30am-11:00am	Exhibit Hall	Break and Exhibit Time	
11:00am-11:50am	Main Stage	College Planning Disrupted - Need-to-know changes from the Big Beautiful Bill CollegeInsideTrack	Pending 1 hr CFP & NCDI
	Breakout Room	Indexing is a Series of Active Decision Kylie Riebe, Dimensional Fund Advisors	1 hr CFP & NCDI
11:50am-1:10pm	Main Stage	11:50-12:20 Lunch & Networking	Pending 1 hr CFP & NCDI
		12:20-1:10PM LTC Planning Panel Moderated by Amy Young, Amphora Wealth	
1:10pm-2:00pm	Main Stage - Keynote	Digital Assets: Basics & Planning Strategies Don Friedman, Digital Assets Council of Financial Professionals	Pending 1 hr CFP & NCDI
2:00pm-2:10pm	Exhibit Hall	Break and Exhibit Time	
2:10pm-3:00pm	Main Stage	Economic & Market Outlook from a Behavioral Perspective Jeff Hybiak, SEM Wealth	Pending 1 hr CFP & NCDI
	Breakout Room	MLG Capital - topic TBD	Pending 1 hr CFP & NCDI
3:00pm-3:30pm	Exhibit Hall	Break and Exhibit Time	
3:30pm-4:20pm	Main Stage - Keynote	Your Money: Reimagining Wealth Through Simple Sketches Carl Richards, The Behavior Gap	1 hr CFP & NCDI
4:20pm-4:30pm	Main Stage	Closing Remarks	