

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 Advice: 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 New Budget Bill Heidi King, CollegeInsideTrack	Pending 1 hr CFP & NCDI
	Breakout Room	Indexing is a Series of Active Decision Kylie Riebe, Dimensional Fund Advisors	1 hr CFP & NCDI
11:50-12:20 Lunch & Networking			
11:50am-1:10pm	Main Stage	12:20-1:10PM LTC Panel: Different Perspectives on the Challenges of Aging Moderated by Amy Young, Amphora Wealth	Pending 1 hr CFP & NCDI
1:10pm-2:00pm	Main Stage - Keynote	Introduction to Crypto and the Spot Bitcoin ETFs Don Friedman, Digital Assets Council of Financial Professionals	Pending 1 hr CFP & NCDI
2:00pm-2:30pm	Exhibit Hall	Break and Exhibit Time	
2:30pm-3:20pm	Main Stage	Economic & Market Outlook from a Behavioral Perspective Jeff Hybiak, SEM Wealth	Pending 1 hr CFP & NCDI
	Breakout Room	Real Estate Market Trends & Areas of Investment Opportunity MLG Capital - topic TBD	Pending 1 hr CFP & NCDI
3:20pm-3:30pm	Exhibit Hall	Break and Exhibit Time	
3:30pm-4:30pm	Main Stage - Keynote	Your Money: Reimagining Wealth Through Simple Sketches Carl Richards, The Behavior Gap	1 hr CFP & NCDI
4:30pm-4:40pm	Main Stage	Closing Remarks	