

2025 FPA Central Virginia Forum
June 11, 12 and 13, 2025

Wednesday, June 11, 2025

Wed, June 11, 2025	General Session	Speaker	Topic
4:00 pm - 6:00 pm	Virtual -Zoom	Melissa Kemp, CFP®	Ethics CE+: A Practical Application of the CFP Boards' Code and Standards, updated July 2024

Thursday, June 12, 2025

Thurs, June 12, 2025	General Session	Speaker	Topic
7:30 am - 8:00 am	Registration/Breakfast	Thank you to our Sponsor, John Cinella, MFS	
8:00am - 8:05 am	Opening Remarks	Alexis Grason, FPACVA President	
8:05 am - 9:05 am	Session 1	Michael J. Egan, CFP®, CIMA, Senior Vice President, First Trust Investment Solutions	Direct Indexing- What it is and Why Are Advisors Embracing It?
9:05 am - 10:05 am	Session 2	Laura Lafayette, CEO, Richmond Association of REALTORS®	The State of the Region's Housing Market
10:05 am - 10:25 am	BREAK	Thank you to our Sponsor, John Cinella, MFS	
10:25 am - 11:25 am	Session 3	Linda Duessel, CFA, CPA, CFP®, Senior Equity Market Strategist, Federated Hermes	Economic and Market Outlook: It All Depends on your Time Horizon
11:25 am - 12:30 pm	LUNCH	Thank you to our Sponsor, John Cinella, MFS	
12:30 pm - 1:30 pm	Session 4	Linda Duessel, CFA, CPA, CFP®, Senior Equity Market Strategist, Federated Hermes	Behavioral Finance: How our Humanness Affects Investment Returns
1:30 pm - 2:30 pm	Session 5	Louis Rogers, CEO Capital Square	Death and Taxes: IRC Section 1031 Tax Deferred Exchanges of Real Property
2:30 pm - 2:50 pm	BREAK	Thank you to our Sponsor, John Cinella, MFS	
2:50 pm - 3:50 pm	Session 6	Hajro Kadribeg, CFA, Investment Consultant, Financial Advisor Services, Vanguard	Fixed Income: What risks to pay attention to in the bond markets today
3:50 pm - 4:50 pm	Session 7	Lauren Liebes, Wealth Strategist; Armand Leaks, Capital Group/American Funds	Tax Policy & Planning Update: Preparing Your High Net Worth Clients for the Uncertainty Ahead
4:50 pm - 5:00 pm	Lifetime Achievement Award		
5:00 pm - 6:30 pm	Happy Hour	Thank you to our Sponsor, Ameriprise Financial	

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Friday, June 13, 2025

Friday, June 13, 2025	General Session	Speaker	
7:30 am- 8:00 am	Registration/Breakfast	<i>Thank you to our Sponsor, Kevin Monaghan, Franklin Templeton</i>	
8:00 am - 8:05 am	Opening Remarks	Alexis Grason, FPACVA President	
8:05 am - 9:05 am	Session 8	Jeff Levine, Kitces	Principles of Tax Planning for Financial Advisors
9:05 am - 10: 05 am	Session 9	Jeff Levine, Kitces	Advanced Roth Conversion Planning Strategies
10:05 am - 10:25 am	BREAK	<i>Thank you to our Sponsor, Kevin Monaghan, Franklin Templeton</i>	
10:25 am - 11:25 am	Session 10	Mary Morris, CEO, Commonwealth Savers	Planning for Disability Related Expenses with ABLEnow
11:25 am - 12:30 pm	LUNCH	<i>Thank you to our Sponsor, Kevin Monaghan, Franklin Templeton</i>	
12:30 pm - 1:30 pm	Session 11	Catherine Williams, Head of Practice Management, Dimensional Fund Advisors	Segmentation Strategy & Service Model Design
1:30 pm -2:30 pm	Session 12	John Erdos, Vice President, BlackRock	The Growing High-Net-Worth Practice
2:30 pm -2:50 pm	Break	<i>Thank you to our Sponsor, Kevin Monaghan, Franklin Templeton</i>	
2:50 pm - 3:50 pm	Session 13	Bryan Gay, Owner, Boomer Insurance	Medicare Beyond Parts A&B and the Impact IRMAA can have on your Clients
3:50 PM	Closing Remarks	Alexis Grason, FPACVA President	