

# 26 Sept

## Conference for Advanced Planning 2025



FINANCIAL  
PLANNING  
ASSOCIATION  
ILLINOIS

**7:30AM**

Conference Begins!  
Check-In & Breakfast

**8:30AM**

Estate Tax Planning-The topic no one wants to address...but we can't afford not to! |  
*Lindsey Markus JD - Shareholder Principal at Chuhak & Tecson, P.C.*

**9:30AM**

FPA of Illinois Advocacy Efforts Update

**9:45AM**

Planning Strategies to Mitigate the Impact of the 10-Year Rule |  
*Jeff Levine, CPA/PFS, CFP®, ChFC®, RICP®, CWS®, BFA®, MSA - Lead Financial Planning Nerd for Kitces.com and Chief Planning Officer at Focus Wealth Partners*

**10:45AM**

Navigating Turbulent Markets |  
*Apollo Lupescu PhD - Vice President, Dimensional Fund Advisors*

**11:35AM**

Networking Lunch

**12:30PM**

Market Trends 2025 |  
*Wes Madara - SVP, Midwest Regional Sales & Distribution Leader at Chubb and Kelly Weiss - Advisor, BCU Risk Advisors*

**1:20PM**

Networking Break with Exhibitors

**2:00PM**

Money and Happiness: How Advisors Can Harness the Science Around Personal Finance and Subjective Well-Being to Better Serve Clients |  
*Donovan Sanchez CFP® - Instructor at University of Illinois Urbana-Champaign & Senior Financial Planner at Model Wealth, Inc.*

**3:30PM**

Conference Social @ City Winery at the Riverwalk (registration required)