

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)