Friday, October 20

2:30 – 3:00
Reception for Residents/Mentors

3:00 – 4:00 General Session
Welcoming Comments
Mentor/Resident Introductions
Afternoon Schedule and Team Assignments

4:00 – 4:45 Team Break-Outs
Resident Introductions and Team-Building Exercise

4:45 – 5:00 General Session
Team Building Exercise Debrief

5:00 – 5:10 Break

5:10 – 7:00 General Session
Discovery – The Initial Interview
  Mentor Demonstration: The Discovery Interview
  Mentor Panel: What is “Discovery?”

Explanation of process for Residents to do the first interview tomorrow morning

**Complete Daily Feedback Form

7:00 – 8:30 Dinner with Your Team
Prepare for Case 1 Client Discovery Meeting

8:30 – 10:00 Social Time
Saturday, October 21

9:00 – 9:30 General Session
FPA Residency Objectives
Announcements and Schedule for the Day - Today’s Learning Objectives
Organize room for team interviews

9:30 – 10:45 General Session
**Case 1 Client Meeting:** Discovery Interview Role Play/Feedback
   
   *Each team chooses 2 people who get 10 min to interview, then the next team takes over. Listen and build on the conversation. Remaining time will be used to critique and discuss your success.*

10:45 – 11:30 General Session
Mentor Panel
Receive Case 1

11:30 – 12:00 Team Break-Outs
Go over case and begin to assess what you’ve learned
   
   *Particularly consider the part of the case your team is assigned.*

12:00 – 1:00 Lunch

1:00 – 1:30 Team Break-Outs
Review case and determine what you want to find out from the Clients

1:30 – 2:45 General Session
**Case 1 Client Meeting:** Discovery continued (same format: 10 mins/team and feedback)
Goal Development and Data Clarification

2:45 – 4:15 Team Break-Outs
Individual Team work on Case I

4:15 – 4:30 Break

4:30 – 6:00 General Session/Team Break-Outs/Team Interaction
Begin the coordination of client resources for Financial Plan Presentation
   
   * Teams have until 10:00 the next morning to coordinate their part with the other teams’ parts to present a cohesive whole plan to the partners. Use this time wisely.*

Teams complete Case Analysis and prepare first draft of their Financial Plan Presentation

**Complete Daily Feedback Form**

6:00 – 7:00 Dinner

7:00 – 8:00 General Session
Mentor Panel

8:00 – 10:00 Social Time
Sunday, October 22

9:00 – 9:10 General Session
Announcements and Schedule for the Day – Today’s Learning Objectives

9:10 – 9:45 Team Break-Outs
Teams continue to coordinate client resources and strategies with other teams
Finalize first draft of Financial Plan Presentation

9:45 – 10:00 Break – and get set up for partner presentation

10:00 – 11:15 General Session
Case 1 Partners Meeting: Teams present their Financial Plan Presentation draft to the firm partners (50 mins)
Partner feedback on team presentations

11:15 – 11:30 Break

11:30 – 12:00 Team Break-Outs
Teams revise their Financial Plan Presentation for Client Presentation Meeting

12:00 – 1:00 Lunch

1:00 – 2:00 Team Break-Outs
Teams finalize their Financial Plan Presentation for Client Presentation Meeting

2:00 – 3:45 General Session
Case 1 Client Meeting: Financial Plan Presentation (50 mins)
Feedback from “Clients” and Mentors

3:45 – 4:00 Break

4:00 – 5:15 General Session
Case 2 Client Meeting: Discovery Interview Role Play/Feedback (10 min/team then feedback)
Receive Case 2

5:15 – 6:30 Team Break-Outs
Review Client Data and Prepare for Follow-Up Discovery Client Meeting (9:10am tomorrow!)

**Complete Daily Feedback Form**

6:30 – 7:30 Dinner

7:30 – 8:30 General Session
Mentor Panel

8:30 – 10:00 Social Time
Monday, October 23

9:00 – 9:10 General Session
Announcements and Schedule for the Day – Today’s Learning Objective

9:10 – 10:15 General Session
Case 2 Client Meeting: Discovery continued (10 min/team then feedback)
Goal Development and Data Clarification

10:15 – 10:30 Break

10:30 – 12:00 Team Break-Outs
Teams work on case and coordinate client resources for Financial Plan Presentation

12:00 – 1:00 Lunch

1:00 – 2:00 Team Break-Outs
Teams complete first draft of their Financial Plan Presentation

2:00 – 3:30 General Session
Case 2 Partners Meeting: Teams present first draft of their Financial Plan Presentation to the firm partners (50 mins)
Partner feedback on team presentations

3:30 – 3:45 Break

3:45 – 5:00 Team Break-Outs
Teams revise their Financial Plan Presentation

5:00 – 6:30 General Session
Case 2 Client Meeting: Financial Plan Presentation (50 mins)
Feedback from “Clients” and Mentors

**Complete Daily Feedback Form**

6:30 – 7:30
Dinner and Evening Off – Social “Fun” time
Tuesday, October 24

9:00 – 9:10 General Session
Announcements and Schedule for the Day – Today’s Learning Objectives

9:10 – 10:15 General Session
**Case 3 Client Meeting:** Discovery Interview Role Play/Feedback (10 min/team then feedback)

*It is particularly important to listen to the other teams’ questions as each team will prepare a complete Financial Plan Presentation.*

Receive Case 3

10:15 – 10:30 Break

10:30 – 11:15 Team Break-Outs
Review Client Data and Prepare for Follow-Up Client Meeting

11:15 – 12:15
**Case 3 Client Meeting:** Discovery continued (10 min/team then feedback)
Goal Development

*It is again important to listen to the other teams’ questions as each team will prepare a complete Financial Plan Presentation.*

12:15 – 1:15 Lunch

1:15 – 2:15 Team Break-Outs
Teams consult with Mentors on Case 3 (last opportunity for Mentor input)

2:15 – 6:30 Team Break-Outs
Teams complete Case Analysis and prepare a complete 30-minute Financial Plan Presentation

**Complete Daily Feedback Form**

6:30 – 7:30
Dinner

7:30 – 10:00 Celebration
Time with Mentors
(Case 3 Financial Plan Presentations and Feedback)

7:45 – 8:30
Presentation #1

8:30 – 9:00
Breakfast

9:00 – 9:45
Presentation #2

9:50 – 10:35
Presentation #3

**Complete Evaluation Form for both Today and Total FPA Residency**

10:40 – 11:25
Presentation #4

11:30 – 12:15
Presentation #5

12:15 – 1:00
Lunch

1:00 – 2:30
FPA Residency Graduation Ceremony

2:30
Farewells and Departure