2017 FPA Residency Agenda
Inverness Hotel & Resort – Denver, CO
October 20 – October 25

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

Wednesday, October 25

(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