

Professional Development Online Course Catalog

- 2015 Retreat and Annual Conference Sessions
- Discounted Bundles
- Top 10 Webinars of 2015

FEATURED
Courses Inside

OneFPA.org/PDC/Catalog

The Professional Development Online Course Catalog

Welcome to the first edition of the FPA Professional Development Online Course Catalog featuring our best recordings and top sellers. You will find discounts on selected packages from the FPA Annual Conference 2015, exceptional deals on all the FPA Retreat 2015 sessions, and special pricing for the Top Ten best-selling webinars of 2015. Plus, get access to discounted pricing of all of the Annual Conference and Retreat sessions from 2015 at your fingertips. All of these are available at www.OneFPA.org and click on Virtual Learning.

Continuing Professional Development and Education

The webinars in this edition offer abundant continuing education opportunities some of which offer CFP CE credit. In order to receive credit for these self-study sessions, you will need to complete a quiz at the conclusion of the recording. Afterwards, to receive your Certificate of Completion for a course, you must: 1. Click the “Get Certificate” button next to the course on your My Account page and 2. Verify you have completed all of the Required Certification Methods for the course in the window that opens from clicking “Get Certificate.” FPA reports continuing education credit to the CFP Board two times each month. If you have completed the CE credits within the last one or two weeks, they will be included with the next submission to the CFP Board. If the credits were completed more than two weeks ago, please contact your dedicated Member Services Advocate at 800.322.4237, option 2. **For detailed instructions and FAQs, please visit www.OneFPA.org and click on Virtual Learning.**

FPA Annual Conference – BE Boston 2015 Bundles



The FPA Annual Conference is the largest gathering of CFP® professionals featuring the best minds in financial planning. Attendees, speakers and partners are among the most innovative folks in the industry who come together to connect and share ideas. The conference is built around sharing practical knowledge and strategies for attendees to take back to their practice for immediate implementation. Participate virtually by purchasing select packages such as *Suddenly Single* and *Social Security* featuring speakers who are the best of the best in the profession.

SUDDENLY SINGLE BUNDLE

Why are people going through divorce often difficult to work with? Can you debunk the myths surrounding pre-nups, explain the basic requirements for enforceability and address practical questions such as how to pop the “P” word? Find out about love, money, marriage, death and divorce in this special set of recordings.

	CE	MEMBER PRICE (30% OFF)	NON-MEMBER PRICE (30% OFF)
	3	\$81.88	\$165.88
SESSION TITLE		SPEAKER NAME	DESCRIPTION PAGE
Love, Money, Marriage and Death: Tax and Estate Planning Aspects of Divorce		Jeremiah Doyle, IV, J.D., LL.M.	5
What’s Up with Pre-Nups: An Overview		Arlene G. Dubin, J.D.	6
When Clients Divorce: A Financial Planner’s Primer on What Happens to Clients During Divorce and How to Respond		Kenneth Neumann	6

SOCIAL SECURITY BUNDLE

What role does Social Security play in retirement planning? How are planners helping their clients address Social Security in retirement? Don't let your clients fall short at retirement. Get specific solutions that are both conceptually simple and eminently feasible because they build on the existing retirement system.

	CE	MEMBER PRICE (30% OFF)	NON-MEMBER PRICE (30% OFF)
	2	\$74.88	\$151.88
SESSION TITLE	SPEAKER NAME	DESCRIPTION	PAGE
Falling Short: The Coming Retirement Crisis and What to Do About It	Andrew Eschtruth		5
Social Security: A Long-Term Perspective for Clients	Kurt Czarnowski		5
Social Security Today and Tomorrow: The Latest AARP/FPA Retirement Research and How It Will Impact You and Your Clients	Sharon Epperson		7

ADVANCED PLANNER BUNDLE

Got sophisticated estate planning for high wealth clients up your sleeve? If not, learn about the more sophisticated estate planning techniques available here! Do you really know everything necessary to advise clients about trusts from A to Z? If not, then "trust" that this session will teach you what you need to know. In addition, there is still time to help your clients prepare to lower their 2015 income tax liability!

	CE	MEMBER PRICE (30% OFF)	NON-MEMBER PRICE (30% OFF)
	3.5	\$81.88	\$165.88
SESSION TITLE	SPEAKER NAME	DESCRIPTION	PAGE
Sophisticated Estate Planning for High Wealth Clients	Diana Zeydel, J.D., LL.M.		5
Trusts: A through Z	Daniel Rubin, J.D., LL.M.		6
Creative Year-End Tax Strategies	Jeff Rattiner, MBA, CFP®, CPA, RFC		4

BUSINESS SUCCESS/SUCCESION PLANNING BUNDLE

Catch a panel discussion about conflict between founders and successors and hear about the most commonly overlooked issues when dealing with business succession planning, including issues relating to legal documents, insurance planning and family harmony. Then learn that there is no better time to be building a financial planning practice than now! Four industry icons will share their secrets of what it takes to bring your practice up to the next level. Finally, identify service models and marketing messages and strategies that resonate with middle income clientele of all ages and stages.

	CE	MEMBER PRICE (30% OFF)	NON-MEMBER PRICE (30% OFF)
	1.5	\$88.17	\$179.17
SESSION TITLE	SPEAKER NAME	DESCRIPTION	PAGE
Succession: Unlocking Value, Power, and Potential in Wealth Management Firms	Timothy Kochis, J.D., MBA, CFP®; Eric Hehman, CFP®; Jay Hummel, CPA		8
Helping Family Business Grow and Maintain Wealth	Steven Goodman, MBA, CPA		5
Best Practices: Secrets of Building a Successful Practice	Ross Levin, CFP®, Greg Friedman, CFP®, Scott Kahan, CFP®, Elissa Buie, CFP®		7
Financial Adviser Marketing and Opportunities with the Middle Class	Sheryl Garrett, CFP®, AIF®		7

NEXGEN BUNDLE

Millennials are set to inherit trillions of dollars from the baby boomers over the next few decades. Do you know how to attract this new wave of clients? Are you ready to finally embrace social media and use it to gain new clients, increase your annual business revenue and land media appearances? Got college in the future? Get concrete ways to help your clients with teenagers lower their college costs by becoming smart college shoppers. Go mobile! Clients want instant access to information and quick responses from you.

	CE	MEMBER PRICE (40% OFF)	NON-MEMBER PRICE (40% OFF)
	2	\$81.58	\$165.58
SESSION TITLE	SPEAKER NAME	DESCRIPTION PAGE	
How to Grow Your Financial Planning Business Using Social Media	Brittney Castro, CFP®, CRPC®, AAMS	7	
Engaging Millennials: The Rubik's Cube of Financial Planning	Eric Roberge, CFP®	4	
Five Simple Yet Effective Ways to Help Your Clients Cut Their College Costs	Lynn O'Shaughnessy	5	
Creating a Mobile Office	David Oransky, CFP®, CPA/PFS, RLP®	7	



BE Boston 2015 Recordings

FPA Annual Conference – BE Boston 2015 CFP CE credit recordings can be purchased individually at \$38.99 for members and \$78.99 for non-members. You can also bundle up to 4 webinars of your choice at the discounted rate.

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Creative Year-End Tax Strategies

Jeff Rattiner, MBA, CFP®, CPA, RFC

There is still time to help your clients prepare to lower their 2015 income tax liability! Many strategies exist in today's environment, some common and some unique, all of which can help your clients reduce 2015 income and get out of the gate running for 2016 and beyond.

1 CFP CE

Dividend Investing in the New Neutral

Raji Manasseh

In a world characterized by low interest rates and moderate growth, investors have turned to higher-yielding stocks to provide income. While such an environment can support equities from here, the prospect of multi-speed economic growth, rising rates in the U.S. and monetary easing in Europe and Asia can present the equity investor with a unique set of risks and opportunities.

1 CFP CE

Engaging Millennials: The Rubik's Cube of Financial Planning

Eric Roberge, CFP®

Millennials are set to inherit trillions of dollars from the baby boomers over the next few decades. This generation has grown up with radically different beliefs and values about money, and they are looking for innovative solutions now. New career paths, family dynamics, and communication methods demand that we make adjustments to our businesses to attract this new wave of clients.

1 CFP CE

Estimating the True Cost of Retirement
(Montgomery-Warschauer Award Winner)

David Blanchett, CFP®, CFA, CLU, ChFC®, AIFA®

Retirement is the most expensive purchase faced by most individuals. This session includes a discussion of the implications of properly forecasting the growth of assets and important considerations when estimating the liability, such as determining the optimal replacement rate, forecasting the retirement period and understanding what it truly means to fail (or succeed) during retirement.

1 CFP CE

Falling Short: The Coming Retirement Crisis and What to Do About It

Andrew Eschtruth

Many of today's workers will lack the resources to retire at traditional ages and maintain their standard of living in retirement. This presentation explains why and offers specific solutions that are both conceptually simple and eminently feasible because they build on the existing retirement system.

1 CFP CE

Five Simple Yet Effective Ways to Help Your Clients Cut Their College Costs

Lynn O'Shaughnessy

As college prices continue to escalate, even affluent families are struggling to cover the costs when some schools are now charging \$250,000 for a bachelor's degree. You will leave this session with concrete ways to help your clients with teenagers lower their college costs by becoming smart college shoppers.

1 CFP CE

Goals Based Asset Management: Which Adds More Value, Higher Returns or Lower Risk?

Mark Smith, CFP®, CPA/PFS, CIMA®

Is modern portfolio theory dead given the high correlation of numerous asset classes over the last decade? Where does the investment adviser's real "value added" come from?

1 CFP CE

Hedging Equities and Fixed Income: Managing Risk

Greg Miller, CPA

This session covers hedging equities and fixed income, managing risk in times of volatility and rising interest rates using convertible bonds. Hear about the history, the marketplace and how convertible bonds

work. Miller discusses the advantages of adding convertible bonds to an allocation to further diversify, lower volatility and reduce risk.

1 CFP CE

Helping Family Business Grow and Maintain Wealth

Steven Goodman, MBA, CPA

This session addresses specific issues that are commonly found when dealing with business succession planning. Goodman offers insight into the most commonly overlooked issues when dealing with business succession planning, including issues relating to legal documents, insurance planning and family harmony.

1.5 CFP CE

Income or Liquidity: What's the Right Approach in Today's Market?

Neil Menard

The financial crisis and persistent market volatility have intensified investor bias toward liquid securities. This presentation discusses the mismatch between the demand for and supply of liquid securities and offers alternatives for those willing to employ a long-term alternative investment strategy.

1 CFP CE

LGBT Financial Planning Next Steps: Married or Unmarried

Stuart H. Armstrong II, CFP®, CLU®, ADPASM, CLTC

With marriage available now to LGBT couples in all 50 states, where do we stand now, what's changed and how can you guide these clients forward? This session provides you key updates related to the June 2015 US Supreme Court decision, how it built on the SCOTUS Windsor decision of 2013, and what should be on your to-do list to guide these clients effectively.

1 CFP CE

Love, Money, Marriage and Death: Tax and Estate Planning Aspects of Divorce

Jeremiah Doyle, IV, J.D., LL.M.

Doyle discusses reviewing an estate plan upon divorce, sale of a personal residence, income and gift tax issues of property settlements, dividing a charitable remainder trust in divorce, liability for joint income tax returns, tax consequences of dividing stock options, deferred compensation and retirement benefits and naming beneficiaries after divorce.

1 CFP CE

Managing Risk: Assessing Long Term Care Funding Strategies

Claude Thau

This presentation explores the attractiveness of "self-insuring" long-term care (LTC) risk, with insights that are almost guaranteed to change your perception of this issue. The funding strategies are organized into three categories – government, personal resources and insurance products. Also, contrast stand-alone long-term care insurance with combo products, longevity annuities and post-funding with life insurance.

1.5 CFP CE

Risk Management – U.S. Equity Investing

Eric Schoenstein

Every investment involves some degree of risk. This presentation by Jensen Investment Management will explore the types of risks, their meaning and impact, and how certain tools and mechanisms can help manage these risks.

1 CFP CE

Social Security: A Long-Term Perspective for Clients

Kurt Czarnowski

You think that you have a pretty good handle on the basics of what the Social Security retirement program has to offer. But, what should you be telling your clients about possible claiming strategies that couples might employ? How about Medicare? Learn about some of the other things that planners ought to know about Social Security so that you can provide real value to your clients when they come to you looking for help.

1 CFP CE

Sophisticated Estate Planning for High Wealth Clients

Diana Zeydel, J.D., LL.M.

Learn about the more sophisticated estate planning techniques available to ultra high net worth clients, including using an installment sale in combination with a GRAT, supercharged credit shelter trusts and more defensive structuring of family partnerships. This session looks at the best structures to maintain the opportunity for a basis step up at the death of the first spouse to die.

1.5 CFP CE

Sorting Through the Options of Qualified, Personal, and Non-Qualified Retirement Plans *Anand Sekhar*

Many advisers have heard clients ask about options for maximizing their own retirement plan contributions. This session will help you sort through the challenges of these questions and the appropriate answers from some of the leaders of our profession.

1 CFP CE

Tax Reform, Fiduciary Definition, Rollovers...What Is Washington Doing and What Do You Need to Know?

Marcia Wagner, J.D.

Learn which advisers will have additional liability exposure under the revised fiduciary rule, distinguish between conflicted and non-conflicted advice, discover how to safely take advantage of rollover opportunities, and explore ways to provide added value to plan sponsor clients in light of curtailment of their sources of advice.

1 CFP CE

Tax-Efficient Withdrawal Strategies in Retirement

Bill Reichenstein, Ph.D., CFA

We consider an individual investor who holds a financial portfolio with funds in at least two of the following accounts: a taxable account, a tax-deferred account like a traditional IRA, and a tax-exempt account like a Roth IRA. We examine various strategies for withdrawing these funds in retirement. We provide the underlying intuition for more tax-efficient withdrawal strategies and demonstrate that these can add more than four years to the longevity to the investor's financial portfolio relative to the strategy espoused by the conventional wisdom.

1.5 CFP CE

The SEC's Cyber Security Initiative: What It Means for Compliance

Daniel D. Hill, J.D., Robert T. Denny, J.D., MBA

Against the backdrop of current cyber security risks and applicable laws for the financial services industry, the SEC's recent initiative regarding the protection of information will be explored. Every financial adviser is at risk, even if supported by the best and most compliant broker-dealer. Practical tips and recommendations on being and staying compliant are offered.

1 CFP CE

The Seven Steps to Protect Yourself, Your Practice, and Your Clients Who Have Diminished Mental Capacity

Robert Mauterstock Jr., CFP®, CLU, ChFC®

What do you do when you discover that one of

your clients has a diminished mental capacity?

According to the Alzheimer's Association, Alzheimer's disease will strike more than 8 million Americans by 2030 (a rise of 60% from 2010). Remember it is not a question of if you will have to work with a client who has diminished mental capacity, but when. Prepare yourself now to protect your client, yourself and your practice.

1 CFP CE

Trusts: A through Z

Daniel Rubin, J.D., LL.M.

Trusts are ubiquitous in estate, gift and generation-skipping transfer tax planning, extremely common in asset protection planning, and not at all uncommon in income tax planning, but do you really know everything necessary to advise clients? If not, then "trust" that this session will teach you what you need to know.

1 CFP CE

What You Don't Know About Medical Expenses in Retirement Can Hurt You

Dan McGrath

Planning for healthcare in retirement has become one of the greatest concerns for investors. This presentation breaks down not only the costs, but how regulations have changed the financial planning process.

1 CFP CE

What's Up with Pre-Nups: An Overview

Arlene G. Dubin, J.D.

Prenuptial agreements have proliferated in recent years. This session will explain why. In addition, this session debunks the myths surrounding pre-nups, explain the basic requirements for enforceability and addresses practical questions such as how to pop the "P" word.

1 CFP CE

When Clients Divorce: A Financial Planner's Primer on What Happens to Clients During Divorce and How to Respond

Kenneth Neumann

This presentation first focuses on the divorce adjustment process and where clients are, which determines how we should best respond to and work with them. The concept of "regression" is addressed to help us understand what clients are experiencing and why people going through divorce are often difficult to work with. We also look at how the litigation process differs from mediation and how this difference informs our work.

1 CFP CE

TOP 10 DOWNLOADED SESSIONS

- 1 **Incorporating Housing Wealth Into Your Retirement Income Stream**
Member: \$29 | Non-Member: \$69
1 CFP CE
- 2 **How to Hypergrow Your Financial Practice and Dominate Any Market**
Member: \$19 | Non-Member: \$49
- 3 **Are you Avoiding Duration Pitfalls?**
Member: \$29 | Non-Member: \$69
1 CFP CE
- 4 **Best Practices in Document Management for Compliance**
Member: \$19 | Non-Member: \$49
- 5 **The Financial Advisers' Guide to Marketplace ("P2P") Lending**
Member: \$29 | Non-Member: \$69
1 CFP CE
- 6 **The Low Volatility Anomaly**
Member: \$29 | Non-Member: \$69
1 CFP CE
- 7 **Five Steps to Protect High Net Worth Clients from High Stakes Lawsuits**
Member: \$29 | Non-Member: \$69
1 CFP CE
- 8 **The Rise of the Digital Adviser**
Member: \$19 | Non-Member: \$49
- 9 **College Saving Strategies and Financial Aid**
Member: \$29 | Non-Member: \$69
1 CFP CE
- 10 **3 Ways to Turn Your Website into a Sales Funnel**
Member: \$19 | Non-Member: \$49

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VISIT

www.OneFPA.org/PDC/Catalog/Top10

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10 Basic Financial Steps for Special Needs Caregivers

Lori Epstein, J.D.; Kelly Piancenti

This workshop discusses 10 basic steps that can help caregivers get started in preparing for the financial future of their dependent with special needs. For caregivers, the single most important issue to address, regardless of the age of the dependent, is the caregiver's own mortality.

Best Practices: Secrets of Building a Successful Practice

Ross Levin, CFP® - Moderator; Gregory Friedman, CFP®; Scott Kahan, CFP®; Elissa Buie, CFP®

There is no better time to be building a financial planning practice than now! Four industry icons share their secrets of what it takes to bring your practice up to the next level.

Creating a Mobile Office

David Oransky, CFP®, CPA/PFS, RLP®

In today's world, clients want instant access to information and quick responses from you; employees want modern technology and more flexibility; and firm owners want more freedom and lower costs. Structuring your practice to be mobile can accomplish all of these and more.

Do Women Need to Manage Money Differently than Men?

Rachel Elson - Moderator; Diane Harris; Eileen O'Connor, CFP®; Kerry Hannon; Lazetta Rainey Braxton, CFP®

Saving, investing, budgeting, earning, and protecting one's assets are financial management tasks that have no gender. This panel explores the latest research on women and money to help answer the question of whether women sometimes need different strategies than men to achieve their financial goals—and, if so, what those strategies should be.

Financial Adviser Marketing and Opportunites with the Middle Class

Sheryl Garrett, CFP®, AIF®

Successfully attracting and serving middle-income clients is often very different from the marketing and service models employed for high-net-worth clientele. This session identifies service models and marketing messages and strategies that resonate with middle income clientele of all ages and stages.

How to Grow Your Financial Planning Business Using Social Media

Brittney Castro, CFP®, CRPC®, AAMS

Are you ready to finally embrace social media and use it to gain new clients, increase your annual business revenue and land media appearances? Financial advisers may understand how important social media is to grow their businesses—but most still lack the skill sets necessary to use it effectively and produce measurable results. Learn how to target your ideal clients on social media and provide a "value" experience for them and more!

How to Minimize the Risk of Being Sued by Your Client

Daniel D. Hill, J.D.

This presentation begins with a discussion of FINRA arbitrations and similar litigation, as well as the current regulatory climate. We then move on to concrete and specific recommendations of the worst things to do to clients, and also the best things you should be doing to minimize the risk of any client suing you.

Internships: A Formalized Approach to Creating the Next Generation of Employees

Lou Stanasolovich, CFP®

Have you ever wanted to hire interns to supplement your existing staff? This presenter describes the recruiting, hiring and training process for interns as well as the duties they perform. In effect, Legend's focus on hiring interns for multiple years has evolved into a minor league farm system for its big league club.

IRA Investor Behavior: Insights and Best Practices

Maria Bruno, CFP®

This session provides advisers with best practices on how to make the most out of IRA financial planning opportunities. We discuss Vanguard's research on IRA investor behavior, ranging from account selection to contribution and withdrawal behavior, as well as prudent tax-planning strategies.

Robo-Advisers: What You Need to Know – Point/Counterpoint

Rich Ellinger, Lex Sokolin, Michael Kitces, MSFS, MTAX, CFP®, CLU, ChFC®, RHU, REBC, CASL

Talk of robo-advisers floods the media these days. What does it really mean for your practice? Learn about the various types of robo services and the impact they are already having on our industry. Then enjoy a spirited debate between two of our colleagues with radically differing perspectives and make your own decision.

Social Security Today and Tomorrow: The Latest AARP/FPA Retirement Research and How It Will Impact You and Your Clients

Sharon Epperson - Moderator; Thomas Hungerford, Ph.D.; Debra Whitman, Ph.D.; Dave Yeske, CFP®, DBA

What role does Social Security play in retirement planning? Do consumers know important claiming strategies and are they taking advantage of them? How are planners helping their clients address Social Security in retirement? These and other questions are the focus of new research being conducted by AARP and FPA. This panel explores the results of this original research and delves into the key takeaways to help planners and their clients address this ultra-important issue in retirement planning. CNBC's Sharon Epperson moderates.



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Succession: Unlocking Value, Power, and Potential in Wealth Management Firms

Timothy Kochis, J.D., MBA, CFP®; Eric Hehman, CFP®; Jay Hummel, CPA

This session is an interactive discussion around the financial, operational and emotional aspects of successful transitions within the independent advisory space. The panel, made up of one founder and two successors, dives into areas where conflict between founders and successors can derail a desired outcome with recommendations on how to overcome this challenge.

Using ECM to Beat Back the Robo Threat

Timothy Welsh, CFP®
Leading financial planning firms are taking advantage of the latest enhancements in client engagement and client servicing technology

to not only level the playing field with the emerging online robo-advisers, but to beat them at their own game. Learn how enterprise content management (ECM) plus document management technology can streamline the new account onboarding process to provide an outstanding client experience.

Value Maximization: Building Equity in Your Business

Matt Matrisian
Within this session, we will review key factors impacting practice value: cash flow, growth rate and practice risk. More importantly, we will share, through the use of case studies and sample acquisition scenarios, the steps you can implement today to ensure greater equity potential tomorrow.

FPA ANNUAL CONFERENCE –



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OVER HALF OF ATTENDEES AGREE

or strongly agree that if they could attend only one conference – it would be the FPA Annual Conference*



40% OF ATTENDEES

say that they were “very likely” to change their practice behavior based on what they had learned at the conference*

* Based on 2015 FPA Annual Conference survey

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Applying Adult Learning Theory to Delivery of Financial Planning

Elizabeth Jetton, CFP®,

Harry Starn, Jr., CFP®, CFA

Educators acknowledge the unique qualities of adult learners and a desire for active, real-life learning activities. In this workshop, participants are introduced to the theory, hear how these principles flow into application and learn how the concepts translate directly into practice. The presenters share specific client-planner situations in which adult learning concepts would lead to elevated communication and counseling outcomes.

1.5 CFP CE

Behaviorally Smart Client Engagement

Hugh Massie, CA, DFP

Independent research shows that behavioral management of the client is 93.6% of the financial planning process. In this highly experiential and practical presentation using interactive case studies, you will learn how to position yourself as a behaviorally smart adviser for being the leader of your clients.

1.5 CFP CE

Better Listening. Better Questions. Bigger, Better & More Cases!

Rod Zeeb, J.D., HDP™

The key to achieving your next level of success can be as simple as asking the right questions. To do that, you must become a better listener. Combine the two activities properly and watch your successes multiply!

1.5 CFP CE

Beyond Financial Success; a Value Systems Perspective

Said Elias Dawlabani

Introduction to a scientific framework on human values that is deeply rooted in social psychology. Attendees are exposed to the psycho-social science of the values systems framework, at one point considered the framework that “explains everything.” Understanding the evolving nature of human needs give attendees a deeper understanding of their own values and those of their clients.

1 CFP CE

Lifting the Veil: Economic Possibilities for Our Time

Pavlina Tcherneva, Ph.D.

The art and science of financial planning is practiced within a space of possibility shaped by many forces including history, tradition, culture, technology, markets and regulation. Pavlina Tcherneva lifts the veil on money, debt, unemployment and inequality to reveal a new world of economic possibility for the 21st century.

1 CFP CE

Money, Stress and Relationships: Research

John E. Grable, Ph.D., CFP®

The purpose of this presentation is to share results from clinical tests designed to evaluate the relationships between and among financial anxiety, physiological arousal, and the intention to engage in financial planning. The presentation includes examples of physiological arousal, as well as dialogue among attendees about arousal perceptions and practical ways to manage a client’s arousal and financial anxiety levels.

1.5 CFP CE

The Dalton CFP® Certification Program.

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Planning for Living in Retirement

Michael Finke, Ph.D., CFP®

Most of us think that retirement will look like our working life without the work. The reality is that work provides many important social interactions and fulfills our need for productivity. Finke presents surprising results on how satisfaction is related to how we spend our time in retirement, where we move, the importance of social activity and productive leisure, if both spouses should retire at the same time, interactions with children, and the impact of health, and how we should plan for later life physical and cognitive decline.

1.5 CFP CE

The Art and Science of Influence

Daniel Crosby, Ph.D.

Persuasion is defined as "communication intended to induce belief or action" and is perhaps the competency most essential to effective business development. By artfully applying these scientific principles, financial professionals can drive home their messages with greater impact. Crosby provides participants with a chance to experience

effective persuasion firsthand, and the toolbox necessary to implement these ideas for immediate benefit.

1 CFP CE

The Demographics Are Changing How We Approach Estate Planning for Our Clients

John Scroggin, J.D., LL.M., AEP®

This program focuses on six specific demographic changes that are changing how we approach estate and tax planning for our clients. For each demographic the program highlights supporting data, how advisers should respond to the change and lists a few traps for the unwary and planning opportunities for clients.

1.5 CFP CE

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Cash Balance & 401(k) Plan Combinations

James Vito Esposito, QPA

Learn the basics of cash balance plans, new comparability benefit formulas, and non-discrimination testing as well as how permissively aggregating a cash balance plan with a 401(k) profit sharing plan can provide substantially meaningful benefits to employees, while maximizing benefits for the owners of small to mid-sized businesses and sheltering assets from the claims of creditors.

Integrating the Art and Science of Financial Planning by Taking Concrete Steps

Elizabeth Jetton, CFP®, Marty Kurtz, CFP®, AIFA®

The six-step, systematic planning process is at the heart of what we do as financial planning professionals. In applying this process in client engagement, we integrate art with science. Attendees will benefit from the session by walking away with concrete steps that can be taken to

improve the level that art and science is integrated in their practices.

Leadership in a World of Uncertainty and Disruption; Implications and Opportunities for Financial Planning

Fred Mandell, Ph.D., Ed.M.

This keynote session outlines the major forces of change causing these new conditions and explores the implications for financial planning and financial planners. Participants will walk away with a better appreciation of how global forces are impacting their clients, prospects and their practices. Learn about a new set of creative skills needed to respond to these conditions.

The Financial Planner of the Future: Building Agility, Confidence and Authenticity in Your Practice

Ana Dutra, J.D., MBA

According to research and client experience, we will discuss the most critical competencies and leadership imperatives for world-class financial

planners. As a number of disruptive market, technology and customer trends take place, how will financial planners' practices be impacted and expected to respond and adapt? Finally, how do world-class financial planners develop authentic advisory relationships and manage difficult clients and situations?

The Power of Presence

Courtney Pullen, MA, LPC

Presence is that elusive characteristic that underlies our primary drive to be in connection, to have a sense of purpose and to make a meaningful contribution in life. This workshop will have two aspects: define the essential aspects of presence so we can see how to access it in our personal and professional lives; and create an experience of how to access presence in small groups so participants leave with an experience of how to generate it.



Learn more about the location and register:

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FREE BOOK FOR FPA MEMBERS

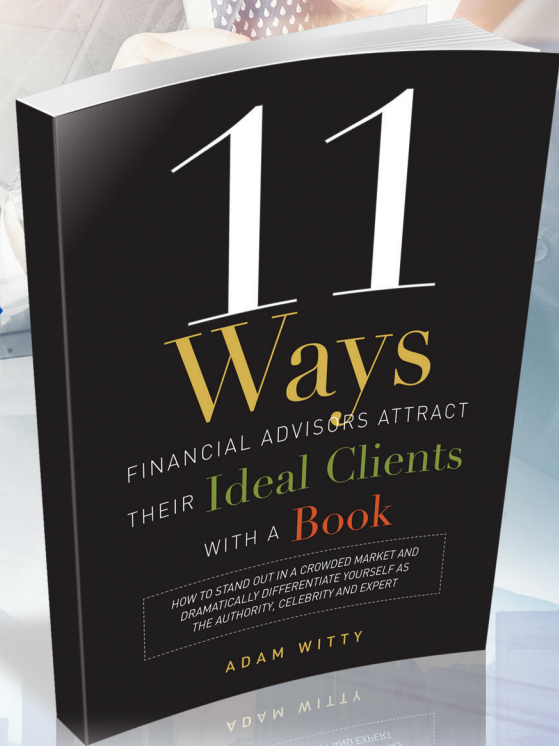
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