



# FPA Residency At-a-Glance

## Day 1

- Registration begins at 1:30 p.m., and all residents **MUST arrive by 2:30 p.m.** for the reception and opening session.
- Residents and mentors are in general session and team breakouts, preparing for case one discovery meeting until 7 p.m. Dinner and social time follows.

## Day 2

- Breakfast at 8 a.m. followed by general session at 9 a.m.
- Residents and mentors are in general session and role-playing discovery interview/client conversations in the morning.
- After lunch, teams breakout to review and begin work on case one and presentations.
- Dinner is followed by general session. Social time follows at 8 p.m.

## Day 3

- Breakfast at 8 a.m. followed by general session at 9 a.m.
- Residents are in team breakouts and general sessions, preparing, revising, and presenting drafts of financial plan to firm partners.
- After lunch, residents work in teams to revise financial plans for client presentation meeting.
- Before dinner, residents receive case two and work with team to review data.
- Dinner is followed by an “Ask Mentors Anything” panel in the general session. Social time follows.

## Day 4

- Breakfast at 8 a.m. followed by general session at 9 a.m.
- Residents and mentors continue discovery with case two, and teams work on case and coordinate client resources for financial plan presentation.
- After lunch, teams complete first draft of their presentations and present to firm partners in a general session.
- Before dinner, teams revise and present their presentations
- Evening off

## Day 5

- Breakfast at 8 a.m. followed by general session at 9 a.m.
- Residents receive case three, role play discovery interview, review data, and prepare for client meeting.
- After lunch, teams consult with mentors on case three, complete case analysis and prepare 30-minute financial plan presentations.
- Dinner and celebration/time with mentors

## Day 6

- Breakfast followed by team final presentations
- Lunch
- FPA Residency Graduation Ceremony takes place from 1:00 - 2:30 p.m. (Residents **MUST** attend graduation. Please calculate this time as you plan your travel.)
- Farewells and departure at 2:30 p.m.