



7:30–8:30 Registration and Continental Breakfast

8:30–9:45 **Opening Keynote** Approved for CFP® credit **Rob Arnott**, PIMCO **“An Overwrought Orthodoxy: What’s Wrong with Conventional Thinking on Asset Allocation and Indexing”**

9:45–10:00 Break with Sponsors

<p>10:00–11:40 <b>Investment Strategy in a Low Return World</b> <i>Paul Gire</i>, CFP®, Strategic Advisory Services, Inc.  Approved for CFP® credit</p>	<p><b>Extreme Makeover: Efficient Operations &amp; Technology in a Mid-Sized Office (4+ persons)</b> <i>Joanne Day</i>, Trumpet, Inc.</p>	<p><b>Tax Update for Financial Planners</b> <i>Kent Noard</i>, EA, CFP®, KLN Financial Group  Approved for CFP® credit</p>	<p><b>Evaluating Existing Annuities: What Every Advisor Needs to Know to Do the Right Thing</b> <i>Michael Kitces</i>, MSFS, MTAX, CFP®, CLU, Pinnacle Advisory Group  Approved for CFP® credit</p>	<p><b>The Advisor’s Guide to Recent Legal Developments in Estate Planning</b> <i>Domingo P. Such III</i>, McDermott Will &amp; Emery LLP  Approved for CFP® credit</p>	<p><b>Helping Seniors Fly the Coop: Choosing the Best Senior Housing Options</b> <i>Kaye Sharbrough</i>, Senior Seasons  Approved for CFP® credit</p>	<p><b>CEU Super Session</b> <i>Sponsored by Jackson Retirement Income Distribution Strategies</i> <i>Eric K. Slack</i>, Jackson; &amp; <i>J. William “Bill” Cooley</i>, Success Continuing Education <i>Session offered multiple times. Attend only once.</i>  Approved CFP® &amp; DOI</p>
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11:45–1:30 **Luncheon Keynote** Approved for CFP® credit **Jason Zweig**, Money Magazine **“Inside the Investing Brain”**

<p>1:45–3:30 <b>Retirement Redesigned: Master Plans for Distribution</b> <i>Harold Evensky</i>, CFP®, Evensky &amp; Katz  Approved for CFP® credit</p>	<p><b>Technology &amp; Practice Management: What We’ve Done That Worked ...And What Didn’t</b> <i>Greg Friedman</i>, CFP®, Friedman &amp; Associates; <i>Norman Boone</i>, CFP®, MBA, Mosaic Financial Partners, Inc.</p>	<p><b>The Destiny of Your Business Value</b> <i>David K. Goad</i>, ChFC, Succession Planning Consultants</p>	<p><b>On the Road with Bob: Leading Edge Techniques in Planning, Investing &amp; Practice Management</b> <i>Bob Veres</i>, Inside Information</p>	<p><b>Estate Planning in a Changing Environment</b> <i>Robert Goldman</i>, JD, CPA, Goldman &amp; Associates  Approved for CFP® credit</p>	<p><b>Debt Optimization for Wealth Building: Strategies for the OTHER Side of the Balance Sheet</b> <i>Don St. Clair</i>, CFP®, National Planning Corporation  Approved for CFP® credit</p>	<p><b>CEU Super Session</b> <i>Sponsored by Jackson Retirement Income Distribution Strategies</i> <i>Eric K. Slack</i>, Jackson; &amp; <i>J. William “Bill” Cooley</i>, Success Continuing Education <i>Session offered multiple times. Attend only once.</i>  Approved CFP® &amp; DOI</p>
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3:30–4:00 Break with Sponsors

<p>4:00–5:40 <b>Practical Applications and Considerations for Portable Alpha Strategies</b> <i>Sabrina Callin</i>, PIMCO  Approved for CFP® credit</p>	<p><b>Finding the Right Type of Client for Your Business</b> <i>Deena Katz</i>, LHD, CFP®, Texas Tech University</p>	<p><b>Long-Term Care Planning—What You Must Know and Why</b> <i>Gene Pastula</i>, Westland Financial Services, Inc.  Approved for CFP® credit</p>	<p><b>Adapting Your Practice to Address the Needs of Your Aging Clients</b> <i>Nick Nicolette</i>, CFP®, Sterling Financial Group  Approved for CFP® credit</p>	<p><b>2007 Technology Implications for All of Us: Upgrade or Not?</b> <i>Joel Bruckenstein</i>, CFP®, CFS, CMFC, Virtual Office Consultants</p>	<p><b>Postmortem Retirement Plan Distributions: Case Studies to Hone Your Skills &amp; Knowledge</b> <i>George Coughlin II</i>, CFP®  Approved for CFP® credit</p>	<p><b>CEU Super Session</b> <i>Sponsored by Jackson Retirement Income Distribution Strategies</i> <i>Eric K. Slack</i>, Jackson; &amp; <i>J. William “Bill” Cooley</i>, Success Continuing Education <i>Session offered multiple times. Attend only once.</i>  Approved CFP® &amp; DOI</p>
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5:40–7:00 **Reception**



7:30–8:30 Registration and Continental Breakfast

8:30–9:45 **Opening Keynote** Approved for CFP® credit **Ranji Nagaswami**, AllianceBernstein, “Why Global Beats Local: Opportunities, Risks, and Rewards in International Investing”

10:00–10:15 Break with Sponsors

<p>10:15–12:00 <b>Risk Is Eternal—The Need for ACTIVE Risk Management</b> <i>Robert Brown</i>, PhD, CFA, Genworth Financial Asset Management, Inc.  Approved for CFP® credit</p>	<p><b>Practice Management: An Owner’s Perspective on Best Practices &amp; Succession</b> <i>Ross Levin</i>, CFP®, Accredited Investors, Inc.</p>	<p><b>Do You Really Want to Live on 3% of Your Portfolio During Retirement? Creating Retirement Income that Lasts (as Long as Your Clients Do)</b> <i>Gail Buckner</i>, CFP®, CRPS, AIF®, Franklin Templeton Investments. Apprd CFP® credit</p>	<p><b>Protecting Your Practice and Avoiding Enforcement in an Ever-Changing Regulatory Environment</b> <i>Thomas Giachetti</i>, JD, MA, Stark &amp; Stark  Approved for CFP® credit</p>	<p><b>Explaining CRTs in Plain English</b> <i>Erik Dryburgh</i>, JD, CPA, Silk, Adler &amp; Colvin  Approved for CFP® credit</p>	<p><b>Independent Due Diligence Analysis of Alternative Investments</b> <i>Todd Synder</i>, Esq., CPA, Snyder Kearney LLC  Approved for CFP® credit</p>	<p><b>CEU Super Session</b> <i>Sponsored by Jackson</i> <b>Retirement Income Distribution Strategies</b> <i>Eric K. Slack</i>, Jackson; &amp; <i>J. William “Bill” Cooley</i>, Success Continuing Education <i>Session offered multiple times. Attend only once.</i>  Approved CFP® &amp; DOI</p>
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12:00–1:00 **Networking Luncheon**

<p>1:15–2:15 <b>Tactical Allocation: Offense &amp; Defense in the Bond Market</b> <i>Carl Kaufman</i>, Osterweis Capital Management  Approved for CFP® credit</p>	<p><b>Pass the Kleenex: Techniques for Working with Clients in Transition</b> <i>Elizabeth Palomeque</i>, CFP®, CDFA, CGRS, Trainer Wortham</p>	<p><b>Finding the Keepers: Recruiting Great Employees in a Seller’s Market</b> <i>Kim Silvers</i>, SPHR, Silvers HR Management</p>	<p><b>Medical Insurance Pre-65: Coverage for Retiring Clients</b> <i>James A. Holt</i>, CFP®, RHU, REBC, Holt Financial Services  Approved for CFP® credit</p>	<p><b>Doing Well And Doing Good: An Introduction to Microfinance</b> <i>Simone Balch &amp; Roger Frank</i>, Developing World Markets  Approved for CFP® credit</p>	<p><b>Is \$5 Million Enough? Evaluating Your Client’s Property &amp; Casualty Needs Against Their Portfolio</b> <i>Eric Henerlau</i>, Anixter &amp; Oser, Inc.  Approved for CFP® credit</p>	<p><b>CEU Super Session</b> <i>Sponsored by Jackson</i> <b>The Power of Disciplined Investing</b> <i>Eric K. Slack</i>, Jackson <i>Session repeats at 2:40. Attend only once.</i></p>
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2:15–2:30 Break with Sponsors

<p>2:30–3:30 <b>Knowing When to Hold or Fold Your Funds: When Patience Is Running Thin with Short-Term Performance</b> <i>Jeremy DeGroot</i>, CFA, Litman Gregory  Approved for CFP® credit</p>	<p><b>Managing Client Expectations Using Investment Policy Statements</b> <i>Linda Lubitz</i>, CFP®, The Lubitz Financial Group; &amp; <i>Norman Boone</i>, CFP®, MBA, Mosaic Financial Partners, Inc. Approved for CFP® credit</p>	<p><b>Supporting Staff Careers in Your Practice: How to Retain Top Talent</b> <i>Michael Kitces</i>, MSFS, MTAX, CFP®, CLU, Pinnacle Advisory Group; &amp; <i>Angela Herbers</i>, Financial Advisor Resource, Inc.; Moderator: <i>Bob Veres</i>, Inside Information</p>	<p><b>Medical Insurance Post-65: Learning the A, B, C, and D’s of Medicare</b> <i>James A. Holt</i>, CFP®, RHU, REBC, Holt Financial Services  Approved for CFP® credit</p>	<p><b>The Art of Eating from 9 to 5: Nutrition Tips That Energize You to Do Your Best Work</b> <i>Lisa Ota</i>, RD, MPH, MA, Sacred Bite</p>	<p><b>Families &amp; Money: Maintaining Harmony Through the Generations</b> A Conversation with <i>Carrie Schwab Pomerantz</i>, Charles Schwab &amp; Co., Inc.; Moderator: <i>Eric Flett</i>, Trainer Wortham Approved for CFP® credit</p>	<p><b>CEU Super Session</b> <i>Sponsored by Jackson</i> <b>The Power of Disciplined Investing</b> <i>Eric K. Slack</i>, Jackson <i>Same as previous session. Attend only once.</i></p>
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3:30–5:45 **Closing Keynote** Approved for 2 hours CFP® Ethics credit **Patrick Kuhse**, Consultant on Business Ethics, “Meeting the Ethical Challenges of Leadership” Plus closing prize drawing