FPA NorCal Conference

DAY 1 Tuesday, May 30

7:30–8:30	**Registration, Continental Breakfast, and Networking**					
8:30–10:00	**Opening Keynote—Alison Levine,** MBA, Adventurer and Author, ***Peakonomics: Leadership Lessons from Everest and other Extreme Environments***					
10:00–10:30	**Networking Break**					
10:30–12:00 [1.5 CE]	**Succession Planning and M&A: Learning the Basics to Achieve the Ideal Transition** David DeVoe, MBA *DeVoe & Company*	**Contrarian Investing with a Value Bias** Shane Shepherd, PhD *Research Affiliates;* Andrew Pyne *PIMCO*	**Small Business Retirement Plans (Including the Single Participant Plan)** Earl Sanders, AOS *Pension Metrix*	**A Fiduciary's Guide to Life Insurance as an Asset Class** Richard Weber, MBA, CLU®, AEP® *The Ethical Edge*	**Cultural Intelligence: Attracting and Retaining Clients from Different Backgrounds** Stephanie Lee, MPA, CFP® *East Rock Financial Services*	**Generating Tax Alpha with Effective Asset Location** Michael Kitces, MSFS, MTAX, CFP®, CLU, ChFC *Pinnacle Advisory Group*
12:00–2:00	**Luncheon Keynote—Jeffrey Gundlach,** CEO and CIO, DoubleLine Capital, ***Economic and Stock Market Outlook***					
2:15–3:30 [1.5 CE]	**The Fed, California, and Fixed Income Positioning** Colleen Ambrose, MBA, CFA® *American Century Investments*	**Managing the Risks and Opportunities of Stock Concentration** Tim Kochis, JD, MBA, CFP® *Kochis Global*	**4+4 — The Formula for Transformational Growth** Angie Herbers *Angie Herbers*	**Your Old Way of Doing Business: An In-depth Look at the Department of Labor's Fiduciary Rule** John Castelly, JD *Personal Capital*	**Choosing The Right Personal Insurance Carrier and How To Minimize Out-of-Pocket Claim Expenses** Kyle Cliff, *HUB International Insurance Services*	**Wealth Planning for Cross-border Families** Andrew Fisher, CFA®, CPA *Worldview Wealth Advisors*
3:30–4:00	**Networking Break**					
4:00–5:00 [1.0 CE]	**LGBTQ — A Different Community with Different Needs?** Deb Kinney, JD *Johnston, Kinney and Zulaica*	**Client Communication Is a Contact Sport: Effective Ways to Inspire Your Clients to Action** Ben Decker *Decker Communications*	**Advisor Evolution: Adapting to the New Age of Advice** Michael Lovett *Vanguard*	**How to Choose the Right Disability Insurance Protection for Your Clients** John Ryan, CFP® *Ryan Insurance Strategy Consultants*	**Late-Stage College Planning: Helping Middle- and High-Income Parents Reduce Out-of-Pocket Expenses** Deborah Fox *Fox Financial Planning Network*	**The Right Side of Change** Jennifer O'Hara Martin, MBA *T. Rowe Price*
5:00–6:30	**Networking Reception**					

DAY 2 Wednesday, May 31

7:30–8:30	**Registration, Continental Breakfast, and Networking**					
8:30–9:45	**Opening Keynote—Laura Arrillaga-Andreessen,** Founder and President, Laura Arrillaga-Andreessen Foundation, ***Giving 2.0: Helping Clients Make More Effective Philanthropic Decisions***					
9:45–10:15	**Networking Break**					
10:15–11:55 [2.0 CE]	**Impact Your Practice with Sustainable and Impact Investing: Panel Discussion** Sonya Dreizler, CFP® *Solutions with Sonya;* Justina Lai, MBA, *Wetherby Asset Mgmt;* Shane Yonston, AIF®, CFP®, MFP, *Impact Investors*	**Maximize Your Business Value Regardless of Size: Panel Discussion with Expert Advisors** CJ Rendic, MBA, *Parallel Advisors;* Milo Benningfield, JD, CFP®, *Benningfield Financial Advisors;* Sabrina Lowell, CFP®, *Mosaic Financial Partners;* Shannon Pike, CFP®, *Tanglewood Legacy Advisors*	**Active vs. Passive: Where Does Smart Beta Fit? Panel Discussion** Jeffrey Blanchard, CFA®, *Bingham, Osborn & Scarborough;* Timothy Devlin, *JP Morgan Asset Mgmt;* Ken Frier, MBA, CFA®, *Secor Asset Mgmt;* Christopher Huemmer, CFA®, *Northern Trust Asset Mgmt*	**TrumpCare: The Future of Our Health Insurance System** Carolyn McClanahan, MD, CFP® *Life Planning Partners*	**Advanced Student Debt Management: A Checklist Approach to Advising Young Professionals** Heather Jarvis, JD *Heather Jarvis, Student Loan Expert*	**Advanced Planning Strategies: An Interactive High-Net-Worth Deep Dive** John Nersesian, CFP®, CIMA®, CIS, CPWA® *Nuveen Investments*
11:55–1:30	**Luncheon and Networking**					
1:30–2:45 [1.5 CE]	**Be Aware! Elder Financial Abuse for Financial Advisors** Ingrid Evans, JD *Evans Law Firm*	**What Clients and Advisors Need To Know About Social Security and Medicare** Elaine Floyd, CFP® *Horsesmouth*	**Strategies to Maximize the Value of Roth Conversions** Michael Kitces, MSFS, MTAX, CFP®, CLU, ChFC *Pinnacle Advisory Group*	**Post-Death Estate Administration** Alma Beck, JD, LLM *Lakin Spears*	**Building a Fixed Income Portfolio to Win on the Downside** Venkatesh Reddy *Zeo Capital Advisors*	**Successful Utilization of ETFs in Client Portfolios** Vijay Vaidyanathan, PhD *Optimal Asset Management*
2:45–3:15	**Networking Break**					
3:15–4:05 [1.0 CE]	**The State of Technology: Collusion and Cooperation between Startups and Fortune 1000** Duncan Logan *RocketSpace*	**The Gathering Storm: Cybersecurity and the Increased Threat of Fraud** Greg Ruppert, JD *Charles Schwab*	**Brexit — A Common Sense Review** Elizabeth Parrott, MSc *Evalueserve*	**Tax Planning in an Uncertain Environment** Meredith Johnson, CPA, CFP® *Burr Pilger Mayer*	**China to the U.S. Investor: "Reports of My Death Have Been Greatly Exaggerated"** Andy Rothman, MA *Matthews Asia*	**Starting a Wealth Management Platform for (Mostly) Millennials — Tales from the Front Line** Christina Kramlich, MBA *SoFi Wealth*
4:05–5:30	**Closing Keynote—Salman Khan,** MS, MBA, Founder and CEO, Khan Academy, ***Education Reimagined***