TOP ADVISOR CONFERENCE FOR 2020
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48th Annual

FPA NorCal Conference

Tuesday, May 26, and Wednesday, May 27, 2020

A Live Conference in a Virtual Setting

Inspiring Excellence and Fostering Community

Welcome to our First Virtual Conference!

There has never been anything like the COVID-19 pandemic, nor the nationwide interruption of economic life that it has engendered. However, the mission of the FPA NorCal Conference remains the same: ***Inspiring Excellence and Fostering Community***. We are pleased to continue our mission this year in a virtual setting.

Speaker Session webinars will take place via an integrated Zoom platform which will allow registrants to submit questions during sessions that will be asked by the Speaker Liaison during Q&A at the end of the session. Networking sessions allow interaction with partners and fellow attendees.

We will have more technical details as the conference approaches. Check our website and email for updates, and, as the conference nears, an FAQ, user manual, and instructions for login.

REGISTRATION The Virtual Conference is open for registration. FPANorCal.org

CONFERENCE APP/EVENT SITE ONLINE Attendees can connect individually with partners and fellow attendees via CrowdCompass, which is available as a mobile app or an online event site. (We highly recommend you watch the conference from a computer or tablet—a phone would not provide optimal viewing.) The online event site and mobile app will be available a few days before the conference, so you can familiarize yourself with sessions/speakers and overall navigation.

CONTINUING EDUCATION Live sessions with CE credit are noted. Additional On-Demand Speaker Sessions will also be available June 1-12, allowing registrants access to recorded sessions and opportunity to qualify for an overall total of 35+ CFP® CE hours.

CANCELLATION POLICY No cancellations after April 30.

FOR MORE INFORMATION Check the conference website for updates/FAQ, or contact the office at 415.413.4044 or info@FPANorCal.org.

KEYNOTE SPEAKERS

Kirstie Ennis

USMC Helicopter Door Gunner Amputee,
7 Summits Climber, Paralympic Snowboarder

Finding Comfort in Being Uncomfortable

After spending six years in the Marine Corps, and sustaining life-threatening injuries in Afghanistan, Kirstie Ennis has embraced being comfortable with being uncomfortable. Now, she is an adaptive adventure athlete and mountaineer who encourages others to learn to suffer well. While we can't control what this sometimes vicious world throws at us, we control what we make of it. If you are comfortable, you aren't at your full potential.

Michael Hasenstab, PhD

Chief Investment Officer, Franklin Advisers

Economic & Stock Market Update: Staying Nimble Amid an Uncertain Outlook

Volatility hit markets in 2019 amid uncertainties about global growth and trade. Central banks took notice, with the US Federal Reserve easing interest rates for the first time in 10+ years and the European Central Bank cutting rates and reintroducing quantitative easing. Dr. Hasenstab discusses why he doesn't see a recession in the near term, but is taking a cautious, nimble approach.

Jennifer Granholm

Former Two-Term Governor of Michigan,
Adjunct Professor of Law and Public Policy, UC Berkeley

Opportunities in the Autonomy Economy

Are U.S. jobs more at risk to robots or globalization? Will driverless cars put 3 million truck and passenger drivers out of work? Jennifer Granholm addresses the employment risks and policy questions in the emerging sector of driverless cars. She engages us in imagining the many entrepreneurial opportunities in this accelerating sector and leaves us encouraged to embrace this new world rather than to be fearful of it.

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FPA NorCal Conference

DAY 1 Tuesday, May 26

9:00–10:00	**Welcome and Introduction to Virtual Conference—**Daniel Andersen, CFP®, Conference Chair **Opening Keynote — Kirstie Ennis,** USMC Helicopter Door Gunner Amputee, 7 Summits Climber, Paralympic Snowboarder, ***Finding Comfort in Being Uncomfortable***					
10:00–10:30	**Networking Sessions —** Connect with our Partners in Zoom Meeting Rooms for more educational opportunities and to enter prize drawings.					
10:30–12:00 [1.5 CE*]	**The Implied Promise of Financial Planning*** Susan Bradley, CFP®, CeFT® *Sudden Money Institute/ Financial Transitionist Institute*	**Best Practices in Tech Selection*** Michael Kitces, *Nerd's Eye View, Pinnacle Advisory Group;* Geoffrey Cable, *Destination Wealth Management;* Charesse Hagan, *Charesse J Hagan, LLC;* Loren Pierson, *Mercer Advisors*	**Death & Divorce: When Bad Goes to Worse*** Mark Prendergast, CPA, CFP®, CDFA®, *Inspired Financial;* Janet Dockstader, JD, CFLS, *Dockstader Orliczky;* Curtis Kaiser, JD/MBA, *Kaiser Law Group*	**Blind Spots That Can Destroy Your Firm** David DeVoe, MBA *DeVoe & Company*	**Utilizing Commission-Free Annuities & Insurance in Your Fiduciary Practice*** David Lau *DPL Financial Partners*	**Past Is Not Prologue: How to Deliver Value for Money via Robust Sources of Return*** John West, BS, Finance, CFA® *Research Affiliates*
12:00–12:30	**TAKE A BREAK** and then come back for our Networking Sessions at 12:30 pm					
12:30–1:30	**Networking Sessions —** Connect with our Partners in Zoom Meeting Rooms for more educational opportunities and to enter prize drawings.					
1:30–2:45 [1.5 CE*]	**Financial Planning 201: How to Improve Your Financial Planning & Client Communication Processes*** Greg Friedman, MS, CFP® *Private Ocean Wealth Management*	**Advanced Concepts and Issues in Long Term Care Insurance Planning*** Michael Kitces, MSFS, MTAX, CFP®, CLU®, ChFC® *Nerd's Eye View, Pinnacle Advisory Group*	**Women & Investing: Authentically Connecting with Women Investors*** Jean Dunn, CFP® *T. Rowe Price*	**Cybersecurity: A Proactive Approach to Protect and Transfer the Risk** Chad Ramberg, BSBM, CLTC® *Box Professional Insurance, LLC;* Steven Ryder *True North Networks*	**Helping Clients Keep Homes Insured & Be Disaster-Resilient Despite Challenging Market Conditions*** Amy Bach, JD *United Policyholders*	**Eight Biggest Special Needs Planning Mistakes You Don't Want to Make*** Kevin Urbatsch, JD *The Urbatsch Law Firm, P.C.*
2:45–3:15	**Networking Sessions —** Connect with our Partners in Zoom Meeting Rooms for more educational opportunities and to enter prize drawings.					
3:15–4:15 [1.0 CE*]	**Communicate to Influence: How to Inspire Your Audience to Action*** Susan Eakin *Decker Communications*	**A Roadmap for Fixed-Income Investing in a Pandemic Economy*** Eddy Vataru, CFA® *Osterweis Capital Management*	**Creative Charitable Planning with Non-Cash Assets*** Bryan Clontz, PhD, CFP®, CAP, ChFC®, RICP, AEP, CLU® *Charitable Solutions, LLC*	**What Every Financial Advisor Needs to Know About Crypto*** Matthew Hougan, BA *Bitwise Asset Management*		
	Daniel Andersen, CFP®, Conference Chair, Closes Day 1					

DAY 2 Wednesday, May 27

8:30–9:30	**Welcome and Introduction to Virtual Conference—**Daniel Andersen, CFP®, Conference Chair **Keynote—Michael Hasenstab, PhD,** CIO, Franklin Templeton Investments, ***Economic & Stock Market Update: Staying Nimble Amid an Uncertain Outlook*** [1.0 CE]					
9:30–10:00	**Networking Sessions —** Connect with our Partners in Zoom Meeting Rooms for more educational opportunities and to enter prize drawings.					
10:00–11:30 [1.5 CE*]	**Changing the Approach to College Funding Advice*** Joseph Messinger, CFP®, ChFC®, CLU® *Capstone College Partners*	**What is Comprehensive Financial Planning?*** Carolyn McClanahan, MD, CFP® *Life Planning Partners*	**Coronavirus Stimulus Bill: New Rules, Planning Strategies and Opportunities*** Jeffrey Levine, CPA/PFS, CFP®, AIF, CWS®, MSA *Kitces.com*	**COVID-19, China, and Your Investments*** Andy Rothman, MPA *Matthews Asia*	**What You Should Know About Longevity Today*** Ken Smith, MS *Stanford Center on Longevity*	
11:30–12:00	**TAKE A BREAK** and then come back for our Networking Sessions at 12:00 pm					
12:00–1:00	**Networking Sessions —** Connect with our Partners in Zoom Meeting Rooms for more educational opportunities and to enter prize drawings.					
1:00–2:15 [1.5 CE*]	**Breaking Rules to Build Stronger Retirement Plans*** S. Katherine Roy, CFP® *JPMorgan Asset Management*	**Dangers of the Subconscious: Understanding Your Brain for Maximum Connection*** Kwame Christian, Esq., MA *American Negotiation Institute* Katherine Knapke, RN, BSN *American Negotiation Institute*	**Integrating Strategic & Tactical Enterprise Planning to Preserve Wealth & Sustain the Family*** Michael Cole *Cresset*	**Enhancing Advisor Value Through Insurance Policy Statement Reviews*** Bob Gertie, CLTC® *Advisor Insurance Resource*	**Retainer Planning: How to Price, Pace, & Plan for Your Monthly Retainer Clients** J.D. Bruce, BA, MS, PFS®, CPA *Abacus Wealth Partners*	**The Future of Work*** Andrew Patterson, CFA® *Vanguard*
2:15–2:45	**Networking Sessions —** Connect with our Partners in Zoom Meeting Rooms for more educational opportunities and to enter prize drawings.					
2:45–3:45 [1.0 CE*]	**The Power of Sleep & Deliberate Rest: Lessons Learned from Elite Athletes & High Performers** Dr. Marty Martin *Zesty Sleep*	**Planning for the International Client: What Financial Planners Should Know about the Mobile Client*** Yulissa Zulaica, Esq. *Johnston, Kinney & Zulaica, LLP*	**Rules of Engagement** Kelli Cruz *Cruz Consulting Group*	**The 90-Day Dash: Capturing Quality Prospects** Matt Beck, BA, Exec. MBA *American Century Investments*	**Transforming Your Business for Generational Success** Jennifer Goldman, CFP® *Jennifer Goldman Consulting*	
3:45–4:45	**Closing Keynote — Jennifer Granholm,** Former Governor of Michigan, ***Opportunities in the Autonomy Economy*** [1.0 CE] **Daniel Andersen, CFP®, Conference Chair, Closes the Virtual Conference**