2013

FPA NorCal Conference

DAY 1 Tuesday, May 28

7:30–8:30	**Registration, Continental Breakfast, and Networking**					
8:30–9:45	**Opening Keynote—Brian Singer, CFA, *William Blair & Company*, "Finding Value While Navigating Risk—A Global Thematic Outlook"**					
9:45–10:15	**Networking Break**					
10:15–11:45 [1.5 CE]	**Team and Technology, Efficient and Effective** Dave Yeske, DBA, CFP® & Elissa Buie, CFP® *Yeske Buie*	**Income Tax Planning for Business Owners and Professionals** Tom Langdon, CFP®, CFA *Gabelli School of Business, Roger Williams University*	**Risk Parity in Portfolio Design** Michael Kitces, MSFS, MTAX, CFP® *Pinnacle Advisory Group*	**Performance Excellence: Extraordinary Acquisition Strategies of Top Advisors** Susan Kay *MFS Fund Distributors*	**Scenario Planning for the Age of Uncertainty** Dennis Stearns, CFP®, ChFC *Stearns Financial Services Group*	**Health Insurance and Medicare Planning for Retirees: The Good, the Bad, and the ACA** Jim Holt, CFP®, RHU, REBC *Holt Financial Services*
11:45–12:30	**Luncheon**					
12:45–2:00 [1.5 CE]	**Interpreting the Household Balance Sheet as a Financial Tool** Andrew Rudd *Advisor Software*	**Your Liquidity Event: A Blueprint to Optimize Valuation and Succession** Dan Seivert *ECHELON Partners*	**The Quest for Certainty in the New Normal—What Advisors Need to Know About the Modern Global Economy** Jason T. Thomas, PhD, CFA *Aspiriant*	**Pay and Perks: How to Build Useful Incentive-Based Compensation Structures** Angie Herbers *Angie Herbers Inc.*	**Financial Planning at the End of Life** Carolyn McClanahan, MD, CFP® *Life Planning Partners*	**Legacy: Why Leave All of Your Wealth and None of Your Wisdom?** Ben Coombs and Marty Kurtz, CFP® *The Planning Center*
2:00–2:30	**Networking Break**					
2:30–3:30 [1.0 CE]	**What's Going on in College Admissions—Why You as an Advisor Should Care** BK Crocker *Crocker College Consulting*	**The New Age of Professional Financial Planners and How to Hire Them Successfully** Caleb Brown, MBA, CFP® *New Planner Recruiting*	**Alternative Investing: Opportunities, Pitfalls, and an Asset Manager's Approach** Charles Blankley, CFA *Gemmer Asset Management*	**Deepening Your Client Engagement Through Impact Investing and Experiential Philanthropy** Randy Manley, JD, CIMC, CIMA *Lodestar Private Asset Mgt.;* & Ron Cordes, *Genworth Financial Asset Management*	**Retain Clients and Attract New Ones by Uniquely Addressing Long-Term Care Issues** Allen Hamm *LTC Navigation*	**Show Your Clients Your Value Through MindMapping** Daxs Stadjuhar *THE Financial Services NETWORK*
3:45–5:45	**Closing Keynote —Benjamin Zander, Conductor, *Boston Philharmonic*, "The Art of Possibility"**					
5:45–7:00	**Reception**					

DAY 2 Wednesday, May 29

2013

7:30–8:30	**Registration, Continental Breakfast, and Networking**					
8:30–9:45	**Opening Keynote**					
9:45–10:15	**Networking Break**					
10:15–12:00 [2.0 CE]	**Savvy Social Security Planning: Knowing the Rules for Claiming Benefits** Elaine Floyd, CFP® *Horsesmouth*	**Team and Technology, Efficient and Effective** Dave Yeske, DBA, CFP® Elissa Buie, CFP® *Yeske Buie*	**Understanding Tactical Asset Allocation** Michael Kitces, MSFS, MTAX, CFP® *Pinnacle Advisory Group*	**Taxocology: It's Not What Your Client Earns; It's What Your Client Keeps!** Kent Noard, EA, CFP® *KLN Financial Group*	**LGBT Clients in Light of the Current Supreme Court Cases: Tax, Estate, and Financial Planning** Deb Kinney, JD *DLK Law Group*	**The Secret Sauce: How to Build a Satisfying, Successful, Scalable Business** Stephanie Bogan *United Capital*
12:15–~~1:15~~ 1:00	**Luncheon**					
1:15–2:30 [1.5 CE]	**Where Can We Find Value in Fixed Income?** Michael Salvay, CFA *Payden Mutual Funds*	**Ultimately, There's No *Success* Without *Succession*** S. Timothy Kochis, CFP® *Kochis Global*	**Behavioral Finance: Real Conversations Advisors Should Be Having with Their Clients** Greg LaBlanc *Haas School of Business, University of California*	**Update on Health Care Reform** Carolyn McClanahan, M.D., CFP® *Life Planning Partners*	**Estate Planning in a New and Uncertain Tax Environment** Tom Langdon, CFP®, CFA *Gabelli School of Business, Roger Williams University*	**The Mobile Advisor: Everything Financial Advisors Need to Know to Be Safe, Connected, and Productive in the Mobile Age** Bill Winterberg, CFP® *FPPad.com*
2:30–3:00	**Networking Break**					
3:00–4:00 [1.0 CE]	**The Power Users' Guide to Using Technology in Resolving Your Biggest Business Challenges** Greg Friedman, CFP®, MS *Private Ocean*	**Connect, Listen, and Communicate: Ways to Use Social Media to Enhance Your Practice** Kathleen Pritchard, CRPC, ChFC, CLU *Legg Mason*	**The Evolving World of Indexing** Corin Frost, CFA *BlackRock*	**Deepen Your Relationship with Your Clients Through the Implementation of Ethical Wills** Elana Zaiman Rabbi	**Behind the Curtain with Top Advisors** Lisa St. Claire, CFP® *Arena Financial;* Deb Wetherby, CFP®, CFA *Wetherby Asset Management;* Norm Boone CFP®, MBA *Mosaic Financial Partners;* Kacy Gott, CFP®, *Aspiriant*	**The Impaired Client—Negotiating Memory's Slippery Slope** Karen Van Zino, M.D.
4:00–5:30	**Closing Keynote—Mitch Anthony, *Connecting For Life*, "Moving from ROI to RDL"**