FPA NorCal Conference

DAY 1 Tuesday, May 26

7:30–8:30	**Registration, Continental Breakfast, and Networking**					
8:30–10:00	**Opening Keynote—Christina Romer,** Class of 1957 Garff B. Wilson Professor of Economics, University of California, Berkeley, ***Monetary Policy for the 21st Century***					
10:00–10:30	**Networking Break**					
10:30–12:00 [1.5 CE]	**The Impact of Valuation-Based Asset Allocation on Retirement Income** Michael Kitces, MSFS, MTAX, CFP® *Pinnacle Advisory Group, Inc.*	**Planning Opportunities from the American Taxpayer Relief Act** John Nersesian, CFP®, CIMA®, CPWA® *Nuveen Investments*	**Create Differentiation: Using Storytelling to Communicate Unarticulated Value** Peter Boumgarden, PhD *Hope College*	**Wisely Guiding Clients Through Aging and Dementia** Amy Florian, MPS, FT *Corgenius*	**Social Security: Good Things Come to Those Who Wait…and Work** Kurt Czarnowski, MPA *Czarnowski Consulting*	**Algorithms Don't Care: Why Relationships Will Win in the Age of Digital Advice** Bill Winterberg, CFP® *FPPad.com*
12:00–2:00	**Luncheon Keynote—Liz Ann Sonders,** Chief Investment Strategist, The Charles Schwab Corporation, ***Economic and Market Outlook***					
2:00–3:15 [1.5 CE]	**25 Technologies Under $25/Month That Will Transform Your Business Today** Alan Moore, MS, CFP® *XY Planning Network*	**Beating the Bias Trap** Bob Seawright *Madison Avenue Securities, Inc.*	**Family Law Boot Camp for Financial Planners: Setting Your Clients' Expectations About Life After Divorce** David Lederman, CFLS *Law Offices of David Lederman, APC*	**How to Help Your Clients Shrink Their College Costs** Lynn O'Shaughnessy *The College Solution*	**"Inevitable" Death and Taxes? Unexpected Tax Consequences from Basic Estate Planning** Clay Stevens, JD,LL.M *Aspiriant*	**Asia Investing: What Matters in the Decades Ahead?** Kenneth Lowe, CFA *Matthews Asia*
3:15–3:45	**Networking Break**					
3:45–4:45 [1.0 CE]	**Beyond Likes, Connects and Follows: Advanced Social Media Marketing for Your Practice** Kristin Harad, CFP® *Broderick Street Partners, LLC*	**Long-Term Care: How Should We Be Planning for Risk?** Ted Porter *Specialists in Health Insurance Services, and GPC Financial Services, LLC*	**Aging: The Most Important Question You're NOT Raising with Clients** Kathleen Pritchard, CRPC®, ChFC®, CLU®, CFS® *Legg Mason & Co., LLC*	**Building a Real Estate Allocation: Opportunities in Liquid Real Estate Securities** Michael Winer *Third Avenue Management, LLC*	**Democratizing Impact Investing: Turning Every American Investor into a Change Agent** Gloria Nelund *TriLinc Global*	**Elite Engagement: Client Engagement Strategies to Elevate Your Practice** Suzette Rothberg, CFP® *American Funds*
4:45–6:30	**Networking Reception**					

DAY 2 Wednesday, May 27

7:30–8:30	**Registration, Continental Breakfast, and Networking**					
8:30–9:45	**Opening Keynote—Kevin Knebl,** CEO, Knebl Communications, LLC, ***High-Tech/High-Touch Relationship Marketing for Huge Financial Advisor Success***					
9:45–10:15	**Networking Break**					
10:15–11:55 [2.0 CE]	**Planning for Health Care Expenses in Retirement** Carolyn McClanahan, MD, CFP® *Life Planning Partners, Inc.*	**Understanding Longevity Annuities and Their Potential Role in Retirement Income** Michael Kitces, MSFS, MTAX, CFP® *Pinnacle Advisory Group, Inc.*	**Bubbles and Golden Ages: Preparing Ourselves and Our Clients for a Rapidly Changing World** Dennis Stearns, ChFC, CFP® *Stearns Financial Group*	**Investment Theory and Practice Panel** Michael Gallmeyer, PhD *University of Virginia* Kevin Sanchez, CFP®, CIMA®, CPWA® *UBS Financial Services, Inc.*	**Building Client Trust and Commitment Through the Annual Update Process** Elissa Buie, CFP® *Yeske Buie*	**Post-Mortem Triage for the Bypass Trust** Ray Sheffield, LL.M *Sheffield Law Office*
11:55–1:30	**Lunch and Networking**					
1:30–2:45 [1.5 CE]	**2015 Tax Update: What You Need to Know** Sharon Kreider, CPA, EA *Sharon Kreider CPA*	**Death of the Rainmaker** Angela Herbers *Angie Herbers, Inc.*	**Corporate Executive Planning Strategies** John Nersesian, CFP®, CIMA®, CPWA® *Nuveen Investments*	**Creating a Team to Serve Your Special Needs Families** Stephen Dale, Esq, LL.M, *The Dale Law Firm, PC*; with Herb Thomas, CLPF, *Herb Thomas & Assoc*, and Nina Herndon, MA, CMC, CLPF, Sage Eldercare Services	**Fixing Your Fixed Income** Colleen Ambrose, CFA *American Century Investments*	**Insurance Sublimits: Why Your Insurance Carrier Is Not Obligated to Pay** Brian Trouette *Trouette Insurance Agency, LLC*
2:45–3:15	**Networking Break**					
3:15–4:05 [1.0 CE]	**Transparency and Communication Requirements for Client Safety in Financial Services: A Transformative Journey** Wade Westhoff, AIF, CFP® *Summit Financial Group, LLC*	**Communication: Is Your Style Affecting Your Referability?** Dawn Lyons *Referral Institute*	**Keeping Family Wealth: The Best Strategies of World-Class Advisors** Susan Kay *MFS Fund Distributors, Inc.*	**Alternative Credit Strategies** Brody Browe, CAIA *Franklin Square Capital Partners*	**Understanding Alternatives and Their Role in Client Portfolios** Jeremy DeGroot, CFA *Litman Gregory Asset*	*Management* **How to Use LinkedIn 15 Minutes per Day for Huge Financial Advisor Success** Kevin Knebl *Knebl Communications, LLC*
4:05–5:30	**Closing Keynote—Simon Mainwaring,** Founder & CEO, We First, ***Strategic Storytelling and the Humanity of Your Brand***