FPA NorCal Conference

DAY 1 Tuesday, May 31

Bringing People Together—Inclusion is Smart Business Sense. The language of business success is inclusion. As financial professionals, we cast a wide net to build better practices. Fostering an environment supporting diversity, financial literacy and NexGen planners is essential to the bottom line.

7:30–8:30	**Registration, Continental Breakfast, and Networking**					
8:30–10:00	**Opening Keynote—Ted Childs,** Principal, Ted Childs, LLC, ***Workforce Diversity: Building Value Among People Who Don't Look Alike***					
10:00–10:30	**Networking Break**					
10:30–12:00 [1.5 CE]	**Tax Strategies for 2016** John Nersesian, CFP®, CIMA®, CPWA® *Nuveen Investments*	**An In-Depth Look at Rebalancing** Michael Kitces, MSFS, MTAX, CFP®, CLU, ChFC *Pinnacle Advisory Group, Inc.*	**Communication and Framework: How to Help Clients Make Better Decisions** Ross Levin, CFP® *Accredited Investors, Inc.*	**Interactive Discussion: How to Build a Strategic Advantage through a Culture of Inclusion** Ted Childs *Ted Childs, LLC*	**3000 Times the Impact: Opportunities and Threats for Client Planning in the Second Industrial Revolution** Dennis Stearns, CFP® *Stearns Financial Group*	**Global Is the New Core: Capitalizing on Diverging Economies and Policies** Raman Srivastava, CFA® *Standish*
12:00–2:00	**Luncheon Keynote—Brian Wesbury, MBA,** Chief Economist, First Trust Advisors, LP, ***The Model of Wealth Creation***					
2:00–3:15 [1.5 CE]	**Savvy Social Security Planning: Update on Claiming Rules and Strategies** Elaine Floyd, CFP® *Horsesmouth, LLC*	**Creating a Long-Term Care PLAN** Carolyn McClanahan, MD, CFP® *Life Planning Partners, Inc.*	**Why Value Investors Underperform** Jason Hsu, PhD *Research Affiliates*	**What Your Social Media Strategy Is Missing and an Interactive Website Smackdown** Jennifer Micieli, CFP® *Credit Karma*	**The Fading Client Quandary: What Can the Financial Planner Do When a Client May Not Be Mentally Competent?** David Baer, JD *Hartog, Baer, Hand*	**Hedge Funds vs. Liquid Alts: What Advisors Really Need to Know!** Bruce Emken, CFA®, CIMA®, CAIA *Goldman Sachs Asset Management*
3:15–3:45	**Networking Break**					
3:45–4:45 [1.0 CE]	**The Dodd-Frank Impact: How the Implementation of Pending Legislation Will Transform Our Industry and Your Business** Skip Schweiss *TD Ameritrade Institutional*	**Enhancing Your Practice by Mastering Aging Issues** Susan Kay *MFS Distributors, Inc.*	**Impact Investing—Are You Talking to Your Clients About It?** Kathleen McQuiggan *Pax World Management LLC*	**Striking It Niche!** Stephen Wershing, CFP® *The Client Driven Practice*	**How to Efficiently Access the Middle Market for Diversification** Brody Browe, CAIA *Franklin Square Capital Partners*	**How to Add Value, Reduce Expenses, and Expand Your Client Base by Adopting Virtual Aspects** Kate Holmes, CFP® *Belmore Financial, LLC*
4:45–6:30	**Networking Reception**					

DAY 2 Wednesday, June 1

7:30–8:30	**Registration, Continental Breakfast, and Networking**					
8:30–9:45	**Opening Keynote—Dan Ariely, PhD,** James B. Duke Professor of Psychology and Behavioral Economics, Duke University, ***Advanced Hindsight: The Psychology of Money***					
9:45–10:15	**Networking Break**					
10:15–11:55 [2.0 CE]	**Advising Clients Through the Toughest Times of Life** Amy Florian, MPS, FT *Corgenius, Inc.*	**The Washington Update: An Overview of the Political Environment, Prospective Legislation, and Strategies for Investment and Retirement Planning** Andrew Friedman, JD *The Washington Update LLC*	**The Advisor of the Future: How to Stay Relevant in the Digital Era** Megan Carpenter, *FiComm Partners;* Victor Gaxiola, *Hearsay Social, Inc.;* Jason Lahita, *FiComm Partners*	**Human to Analytical Side: Tools to Carry Clients through a Long Retirement** David Yeske, PhD, CFP®, *Yeske Buie;* Jonathan Guyton, CFP® *Cornerstone Wealth Advisors, Inc.*	**Evaluating Existing Variable Annuities** Michael Kitces, MSFS, MTAX, CFP®, CLU, ChFC *Pinnacle Advisory Group, Inc.*	**Is It Safe to Go Outside Yet? Portability, Deceased Spouse Unused Exemptions and Trusts as IRA Designated Beneficiaries** Harry Maring, JD, LLM *Maring Law Firm*
11:55–1:30	**Luncheon Keynote—Ron Cordes,** Founder of the Cordes Foundation					
1:30–2:45 [1.5 CE]	**Have Your HNW Clients Outgrown Their Insurance? How Lifestyle Spending Creates Hidden Risks** Brian Trouette *Trouette Insurance Agency, LLC*	**Providing Needs-Based Strategies for Concentrated Stock Positions** John Nersesian, CFP®, CIMA®, CPWA® *Nuveen Investments*	**Financial Planning in a World of Robots** James Simos, CFP® *Infinity Financial Services*	**Bonding Over Bonds, You and Your Client** Colleen Ambrose, CFA® *American Century Investments*	**Treating Volatility as an Asset Class: Using Option Strategies to Profit from Uncertainty** Eric Cott, *The Options Industry Council;* Ralph Drybrough, *Fort Point Capital Partners*	**Creating a More Meaningful Estate Planning Experience: Evolution of the CFP Professional** John Warnick, Esq. *The Purposeful Planning Institute*
2:45–3:15	**Networking Break**					
3:15–4:05 [1.0 CE]	**Mining the Tax Return for Planning Gems** Annette Brinton, CFP®, CPA *Waypoint Wealth Partners*	**How to Get More from a College Education—By Paying Less for It** John Buerger, CFP®, MSMS *ALTUS Wealth Solutions*	**Cyber Security: What Issues Should Concern Your Clients** Hank Holland *Private Banking & Investment Group at Merrill Lynch*	**How to Attract New Clients: Sales for the Non-Sales Professional** Dan Klein *Platinum Strategies*	**Getting Creative with Today's Long-Term Care Planning** Debra Rauser, RN *ACSIA Partners, LLC*	**When Is It Appropriate to Target Market Size, Value, and Profitability Premiums?** Marlena Lee, MBA, PhD *Dimensional Fund Advisors*
4:05–5:30	**Closing Keynote—Farnoosh Torabi,** farnoosh.tv, ***Women, Men and Money: A New Paradigm***