47th Annual

FPA NorCal Conference

Tuesday, May 28, and Wednesday, May 29, 2019

The Palace Hotel, San Francisco

Inspiring Excellence and Fostering Community

Register via credit card at www.FPANorCal.org

Early Bird		
Register by Feb. 1	**$769 member**	**$969 non-member**
Regular		
Feb. 2 until sold out	**$919 member**	**$1119 non-member**

CONTINUING EDUCATION CREDITS Appropriate sessions are filed with the CFP® Board of Standards.

CANCELLATION POLICY 90% refund (10% handling charge) if written request is received by Friday, April 5. 50% refund if written request is received by Friday, April 26. No refunds after April 26. Email written request to the Conference Director.

HOTEL RESERVATIONS Contact The Palace Hotel at 415.512.1111 and ask for the "FPA Conference" rate of $269 per night. Or reserve your hotel room on the website Hotel Reservations page.

FOR MORE INFORMATION Find FAQs on the website or contact the office at 415.413.4044 or info@FPANorCal.org.

KEYNOTE SPEAKERS

Mike Robbins
CEO, Mike Robbins, LLC

Authentic Leadership

Leadership can be challenging, especially in today's fast-paced, globalized world. Leaders with a strong sense of emotional intelligence (EQ), a willingness to be courageous and vulnerable, and the capacity to inspire others in a genuine way, have a distinct advantage. This presentation, which is based on the core principles of Mike Robbins' work and books, delves into practical ways for leaders to enhance their impact and effectiveness by leading with authenticity.

Marci Rossell, PhD
Economist

Economic Forecast for 2019: A Roadmap for Investors in the Trump Era

Dr. Marci Rossell brings a world of experience—from Main Street to Wall Street—when discussing the US economy, international events and capital markets. Dr. Rossell started her career with the Federal Reserve Bank in Dallas and later worked at OppenheimerFunds and CNBC. She makes complex economic issues understandable and relevant to clients' lives. In her animated and no-holds-barred manner, Dr. Rossell shares her thoughts on the current, and rapidly-changing, economic and geo-political environment.

Brock Long
Former Administrator, Federal Emergency Management Agency (FEMA)

The Nation's Largest Disaster: Liquid Asset Poverty

Many factors affect individual resilience during a disaster. Brock Long's experience in emergency management spans nearly 20 years and disasters from the Deepwater Horizon oil spill to the recent Camp Fires. Under Mr. Long's leadership, FEMA partnered with financial organizations to underscore the importance of financial literacy and preparedness. Financial advisors can provide critical guidance to build a culture of preparedness; Mr. Long discusses how we can all work together to make an impact.

Greg McKeown
CEO, McKeown, Inc.

Essentialism: The Disciplined Pursuit of Less

Participants learn the value proposition for Essentialism and three practices for applying Essentialism, namely, Explore what is essential, Eliminate the nonessentials, and Execute what matters most as effortlessly as possible. Attendees leave with a 21-day challenge with specific steps to put Essentialism into practice immediately.

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FPA NorCal Conference

DAY 1 Tuesday, May 28

7:30–8:30	**Registration, Continental Breakfast, and Networking**					
8:30–10:00	**Opening Keynote—Mike Robbins,** CEO, Mike Robbins, LLC, ***Authentic Leadership***					
10:00–10:30	**Networking Break**					
10:30–12:00 [1.5 CE*]	**Transitioning to Medicare and Social Security** Elaine Floyd, CFP® *Horsesmouth*	**The Continuing Soap Opera of Health Care Reform** Carolyn McClanahan, MD, CFP® *Wealthcare Planning, LLC*	**Five Industry Trends Reshaping Financial Advice** Michael Kitces, MSFS, MTAX, CFP®, CLU®, ChFC® *Nerd's Eye View* *Pinnacle Advisory Group*	**ESG/SRI Investing: Tools, Tips & Techniques for Integrating Clients' Values into Their Portfolios** Mark Bateman *Aperio Group*	**Psychology of Money: The Latest in Behavioral Economics** Kristen Berman *Irrational Labs*	**Taking the Complexity Out of Alternative Investments for Improved Portfolio Diversification** Brian R. Murphy, *Vivaldi Capital Management, LLC*; Raleigh Peters, *Blackstone*; Kevin Winters, *PIMCO*; Wade Pitts—Moderator, *Fort Point Capital Partners*
12:00–2:00	**Luncheon Keynote—Marci Rossell, PhD,** Economist, ***Economic Forecast for 2019: A Roadmap for Investors in the Trump Era***					
2:00–3:15 [1.5 CE*]	**The Leadership Pipeline: Recruiting, Mentoring & Developing the Next Generation** Cheryl Holland, CFP® *Abacus Planning Group, LLC*	**Passive Investing Doesn't Mean Passive Due Diligence** Matt Goller *Vanguard*	**The Future of Wealth Management** Sanjiv Mirchandani, MBA *Fidelity Clearing & Custody Solutions*	**Best Practices of Legacy Families: How They Learn & Thrive** Courtney Pullen, MA *Pullen Consulting Group LLC*	**Solo Ager Clients: Their Needs & Your Role** Sara Zeff Geber, PhD *LifeEncore*	**Nature, Nurture & Financial Planning** Hersh Shefrin, PhD *Santa Clara University*
3:15–3:45	**Networking Break**					
3:45–4:45 [1.0 CE*]	**The Power of Sleep & Deliberate Rest: Lessons Learned from Elite Athletes & High Performers** Marty Martin, PsyD, MPH, MSc *Reflections Psychological Services, Inc.*	**Investing in Cannabis: Finding Alpha Through the Smoke** Sumit Mehta *MAZAKALI*	**Fire & Water: Protecting Your California Clients from the Biggest Threats to Their Property** Kelly Greene, CPCU *Chubb Personal Insurance*	**Looking to the Future of the Profession: FPA & NexGen** Martin Seay, PhD, CFP® *Kansas State University*	**Learn How to Evaluate Your RIA Business Risks & Build a Risk Manage-ment Plan** Chad Ramberg, CLTC® *Box Professional Insurance, LLC*	**Mindfulness Practices for Reducing Stress, Improving Focus, & Staying on Purpose** Cassandra Vieten, PhD *Institute of Noetic Sciences*
4:45–6:30	**Networking Reception**					

* *Acceptance of sessions for CE credit yet to be determined by CFP Board.*

DAY 2 Wednesday, May 29

7:30–8:30	**Registration, Continental Breakfast, and Networking**					
8:30–9:45	**Opening Keynote — Brock Long,** Former Administrator, Federal Emergency Management Agency (FEMA), ***The Nation's Largest Disaster: Liquid Asset Poverty***					
9:45–10:15	**Networking Break**					
10:15–11:55 [2.0 CE*]	**How to Become an Employer of Choice** Mark Tibergien *Pershing Advisor Solutions*	**Employee Stock Options: Attracting the C-Suite** John Nersesian, CIMA®, CPWA®, CFP® *PIMCO*	**Evaluating Existing Variable Annuities: What Every Advisor Needs to Know** Michael Kitces, MSFS, MTAX, CFP®, CLU®, ChFC® *Nerd's Eye View* *Pinnacle Advisory Group*	**How to Have Tough Conversations with Tact** CrisMarie Campbell, MBA, Master Coach; Susan Clarke, MA, Equus Coach *Thrive! Inc.*	**From Talk to Action: Laying a Foundation for Advisors to Embrace a Culture of Diversity & Inclusion** Louis Barajas, MBA, CFP®, EA, *Wealth Mgmt LAB;* Julia Carlson, *Financial Freedom Wealth Mgmt Group;* Kate Healy, *TD Ameritrade;* Cameo Roberson—Moderator, AAMS®, *Atlas Park Consulting & Finance*	**Mastering Your Mindset & Methods to Elevate Your Success** Stephanie Bogan *Educe, Inc.; Limitless Advisor Coaching*
11:55–1:30	**Luncheon and Networking — Special Guest**					
1:30–2:45 [1.5 CE*]	**Where Portfolio Theory Meets Practice** Chad Hileman, CFA®, CFP®, Chris Sidoni, CFA®, CFP® *Gibson Capital, LLC*	**Linking Cash Flow Management & Life Planning: Your Most Important Client Conversation** Amy Mullen, CFP® *Money Quotient*	**Expand Your Definition of Ownership: Advice for the Next Generation** Eric Leeper, CFA®, Christine Sjölin *FP Transitions*	**How Family Dynamics Impact InterGenerational Wealth Transfers** Jean Dunn, CFP® *T. Rowe Price*	**Education Planning for Business Owners Under the Tax Cuts & Jobs Act** Ross Riskin, CPA/PFS, CCFC *The American College of Financial Services*	**Trust Busting: Modification, Decanting & Termination of Irrevocable Trusts** Deb Kinney, JD *Johnston, Kinney & Zulaica LLP*
2:45–3:15	**Networking Break**					
3:15–4:05 [1.0 CE*]	**China: Time to Get Off the Sidelines** David Dali *Matthews Asia*	**Equity Fluent Leadership: Why & How Financial Advisors Can Lead the Way** Kellie McElhaney, PhD *Haas School of Business, UC Berkeley*	**Beyond You...The Other Factors Influencing Client Financial Success** Sarah Fallaw, PhD *DataPoints LLC*	**Student Loan Master Class** Heather Jarvis, JD *Heather Jarvis, Student Loan Expert LLC*	**Pirates Without Borders** Steve Ryder *True North Networks, LLC*	**Diversifying with Private Investments** Devin Ekberg, CFA®, CPWA®, CIMA® *Investments & Wealth Institute*
4:05–5:30	**Closing Keynote — Greg McKeown,** CEO, McKeown, Inc., ***Essentialism: The Disciplined Pursuit of Less***					

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