2019 FPA DFW Conference #MovingForwardTogether

Thursday, May 16, 2019

Start	End			
7:30 AM	8:30 AM	**Registration, Breakfast and Meet & Greet with Exhibitors**		
8:30 AM	9:50 AM	**Welcome & Opening Remarks** **Tax Efficient Withdrawal Strategies in Retirement** Michael Kitces, CFP®, MSFS, MTAX, CLU, ChFC, RHU, REBC, CASL Nerd's Eye View - Publisher | Pinnacle Advisory Group - Partner 1.5 CFP, CIMA, CPA, NAPFA		
9:50 AM	10:10 AM	**Morning Networking Break I Exhibit Hall**		
Start	**End**	**MAVERICKS**	**COWBOYS**	**RANGERS**
10:10 AM	11:00 AM	**Advanced Roth Conversion Strategies** Michael Kitces, CFP®, MSFS, MTAX, CLU, ChFC, RHU, REBC, CASL Nerd's Eye View - Publisher Pinnacle Advisory Group - Partner 1 CFP, CPA, CIMA, NAPFA	**Navigating Education Planning Under the Tax Cuts & Jobs Act** Ross Riskin, CPA/PFS, CCFC American College of Financial Services Assistant Professor of Taxation 1 CFP, CPA, CIMA, NAPFA	**Create Client Loyalty Across Generations By Understanding Family Dynamics** Jean Dunn, CFP® T. Rowe Price Associates, Inc. | Vice President 1 CFP, CPA, CIMA, NAPFA
11:00 AM	11:10 AM	**Morning Transition Break**		
11:10 AM	12:00 PM	**Advanced Roth Conversion Strategies** Michael Kitces, CFP®, MSFS, MTAX, CLU, ChFC, RHU, REBC, CASL Nerd's Eye View - Publisher Pinnacle Advisory Group - Partner 1 CFP, CPA, CIMA, NAPFA	**Navigating Couple Dynamics** Sonya Lutter, Ph.D., CFP® Kansas State University Institute of Personal Financial Planning | Associate Professor 1 CFP, CPA, CIMA, NAPFA	**A Wealth Manager's World: Why P&C Matters** Linden Nelson, CIC, CPRM + Chubb Swingle Collins & Associates | Personal Risk Advisor 1 CFP, CPA, CIMA, NAPFA, TDI
12:00 PM	1:00 PM	**NETWORKING LUNCH WITH PARTNERS I GRAND BALLROOM**		
1:00 PM	1:50 PM	**Lessons Learned From Recent Disasters** Linda Shirkey The Advisors Resource | President 1 CFP, CPA, CIMA, NAPFA	**Collaborative Divorce & The Financial Professional** David T. Brunson, CFP®, CFA, CDFA Lifeway Financial Corporation 1 CFP, CPA, CIMA, NAPFA	**Topic TBA** Ajamu Loving, Ph.D. UNT Dallas | Asst Professor of Business Finance 1 CFP, CPA, CIMA, NAPFA
1:50 PM	2:00 PM	**Afternoon Transition Break**		
2:00 PM	2:50 PM	**Succession Planning** Thomas Fink Ameritas | VP RIA Business Development 1 CFP, CPA, CIMA, NAPFA	**Hope Is Not A Strategy** Bud Moore, CFP® Valesco Industries | Managing Partner CE TBA	**NexGen** Tess Downing, MBA, CFP® CE TBA
2:50 PM	3:00 PM	**Afternoon Transition Break**		
3:00 PM	3:10 PM	**Day 1 Door Prize Drawings I Grand Ballroom**		
3:10 PM	4:30 PM	**Picking the Lock of Complexity** Paul Blease, CFP® Oppenheimer Funds | Director of CEO Advisor Institute 1.5 CFP, CPA, CIMA, NAPFA		
5:30 PM	6:30 PM	**Post-Conference Reception I Exhibit Hall**		

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Friday, May 17, 2019

Start	End			
7:30 AM	8:20 AM	**EARLY BIRD BONUS CE SESSION** **Details Coming Soon!** 1 CFP, CPA, CIMA, NAPFA		
Start	**End**			
7:30 AM	8:30 AM	**Registration, Breakfast and Meet & Greet with Exhibitors**		
Start	**End**			
8:30 AM	9:45 AM	**Cut the Crap: Improve Your Health & Increase Your Wealth By Focusing On What Really Matters** Jake B. Melton Speaker I Author I Coach - The J.B. Melton Group 1.5 CFP, CPA, CIMA, NAPFA (Pending Approval)		
9:45 AM	10:10 AM	**Morning Networking Break I Exhibit Hall**		
Start	**End**	**MAVERICKS**	**COWBOYS**	**RANGERS**
10:10 AM	11:00 AM	**Incorporating Socially Responsible, Impact Investments Into Your Practice** Shane Yonston, AIF®, CFP® , MFP Impact Investors I Principal Advisor 1 CFP, CPA, CIMA, NAPFA	**Power In Numbers: How Business Metrics Can Boost Firm Performance** Lisa Crafford, MBA BNY Mellon, Pershing I VP, Relationship Management 1 CFP, CPA, CIMA, NAPFA	**Where Portfolio Theory Meets Practice** Chris Sidoni, CFA, CFP® Gibson Capital, LLC I Chief Investment Officer, Partner Chad Hileman, CFA, CFP® Gibson Capital, LLC I Director of Investment Research 1 CFP, CPA, CIMA, NAPFA
11:00 AM	11:10 AM	**Morning Networking Break I Exhibit Hall**		
11:10 AM	12:00 PM	**The Usual Suspects: Retirement Plan Options For Small Business Owners** Edmund Wong, AIF®, CFP® , RICP® Planning & Financial Advisors | Owner 1 CFP, CPA, CIMA, NAPFA	**Investment Strategies For Blockchain & Crypto** Matthew Le Merle Fifth Era & Keiretsu Capital | Managing Partner 1 CFP, CPA, CIMA, NAPFA	**Behavioral Finance** Brent Dunn 1 CFP, CPA, CIMA, NAPFA
12:00 PM	12:10 PM	**Day 2 Door Prize Drawings I Grand Ballroom**		
		Lunch & Closing Keynote I Grand Ballroom		
12:10 PM	1:00 PM	**Closing Keynote: Topic TBA** 1 CFP, CPA, CIMA, NAPFA		
		Transition I Adjournment		
1:10 PM	3:00 PM	**CFP® Board of Standards Ethics I Qualifies for 2 CFP® Ethics CE (Not Eligible For TDI Ethics)**		