

FPA National Capital Area Presents: The 2019 Winter Educational Symposium

**Planning for The 21st Century - Understanding the Changing Profession and
New Retirement Challenges**

Monday, January 21, 2019 – Dulles Hyatt, Herndon, VA

CERTIFICATE OF ATTENDANCE

This Certifies that _____

Attended the education sessions indicated below:

Time	Speaker	Topic	CE and ID Numbers
6:30 - 8:30 am	Bonnie Kirchner, CFP® <i>Sea Change Financial Education</i>	Ethics Training	2 Ethics CE *CFP ID: 249035 MD INS ID: 104861-E VA INS ID: 219184-E
8:55 - 9:45 am	Holly Donaldson <i>Holly Donaldson Financial Planning, LLC</i>	Communication Gaps Between the Generations	1 CE CFP ID: 257467 MD INS ID: 0 VA INS ID: 219185-OGI
9:45 - 10:35 am	Barbara Kay <i>Barbara Kay Coaching</i>	Positive and Productive Client Communication	1 CE CFP ID: 257468 MD INS ID: 0 VA INS ID: 0
11:00 – 11:50 am	Ryan Sullivan <i>Hartford</i>	The Future of Advice: Education and Longevity are Raising the Expectations of Advice	1 CE CFP ID: 257469 MD INS ID: 104864-LH VA INS ID: 219187-OGI
1:15 - 2:05 pm	Joe Carbone <i>Fidelity Investments</i>	Investment Themes for 2019	1 CE CFP ID: 257470 MD INS ID: 104865-LH VA INS ID: 219188-OGI
2:05 - 2:55 pm	Jerry Varlea <i>Money Guide Pro</i>	The Power of Financial Planning	1 CE CFP ID: 257471 MD INS ID: 104866-LH VA INS ID: 219189-OGI
3:20 - 4:10 pm	Kathleen Burns Kingsbury <i>KBK Wealth Connection</i>	When She Earns More: Winning the Business of Women Bread Winners	1 CE CFP ID: 257472 MD INS ID: 104867-LH VA INS ID: 219190-OGI
4:10 - 5:00 pm	Kay Bransford <i>MemoryBanc</i>	From Overwhelmed to Ordered: Helping Your Clients Prepare for the Rest of Their Lives	1 CE CFP ID: 257473 MD INS ID: 104868-LH VA INS ID: 219192-OGI

**Sessions Approved as Noted with ID Numbers
Certificate of Attendance Info Continued on Next Page**

Location: **Dulles Hyatt, Herndon, VA**

Date: **Monday, January 21, 2019**

Sponsoring Organization: **FPA National Capital Area**

CFP Sponsor ID: **2204**

MD Insurance Sponsor ID: **207744**

VA Insurance Sponsor ID: **123870**

*** CFP Ethics Course Attendees' CE will be filed by Presenter with the CFP Board.**

All CFP, MD and VA Credits are filed electronically, PROVIDED THAT you have followed the directions and returned your COURSE EVALUATION SHEET indicating the presentations that you attended, as well as the CE needed with your proper reporting ID numbers, OR you have completed the CE Reporting ON line on the AdvisorAdit event tool.

Peggy Nelson

Peggy Nelson, Executive Director
FPA – National Capital Area

CERTIFICATE OF ATTENDANCE

This Certifies that _____

Attended the education session indicated below:

Program: 2019 Winter Symposium and Ethics Course

Location: Dulles Hyatt, 2300 Dulles Corner Blvd. Herndon, VA 20171

Sponsoring Organization: **FPA National Capital Area**

CIMA Sponsor ID: **222253**

CE Program Details

CourseTitle	CourseID	TotalHours	EthicsHours	StartDate	EndDate	Status
Winter Symposium	18FPAN012	9.00	2.00	01/21/2019	01/21/2019	Accepted

The Sponsor/Provider and Course ID numbers referenced above expedite the review process of CE hours reported to IMCA by the certificant directly.

Please note that the CIMA Hours must be self-reported for this Program.

Please note that you may report a portion of these hours if you did not attend the entire program.

Peggy Nelson

Peggy Nelson, Executive Director
FPA – National Capital Area

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Planning for The 21st Century - Understanding the Changing Profession and New Retirement Challenges

Monday, January 21, 2019 – Dulles Hyatt, Herndon, VA

CERTIFICATE OF CPE ATTENDANCE

This is to certify that _____ CPA, attended the following Continuing Professional Education presentation: 2019 Winter Symposium, January 21, 2019, Dulles Hyatt, Herndon, VA 20171. Approved for 9 CFP, 9 CIMA, 7 MD Insurance, and 8 VA Insurance for the day.

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Sponsoring Organization: **FPA National Capital Area**

Speakers, Qualifications, Courses and Hours:

Please see individual Bios and Presentation materials available for this event for more specific information.

Peggy Nelson

Peggy Nelson, Executive Director
FPA – National Capital Area

State boards of accountancy have final authority on the acceptance of individual courses for CPE credit