FPA
FINANCIAL PLANNING ASSOCIATION

OF THE PHILADELPHIA
TRI-STATE AREA

26th Annual Spring Symposium

Tuesday, May 14, 2013

Penn State Great Valley Conference Center

30 East Swedesford Rd.
Malvern, PA 19355
610.648.3209

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FPA FINANCIAL PLANNING ASSOCIATION

OF THE PHILADELPHIA TRI-STATE AREA

AGENDA

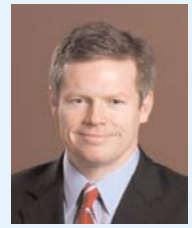
	Session A		Session B
7:30-8:25am	Registration and Continental Breakfast		
8:25-8:30am	Introduction by Bill Suplee		
	Session A		**Session B**
8:30-10:20am	*Ethics in Action* Dan Candura, CFP®, Founder, Candura Group, LLC 2 CFP® CE Credits (Approved) 2 PA State Insurance CE Credits (Pending)	OR	8:30-9:20am *How to Leverage Tablets and Social Media in Your Business* (Not approved for CFP® CE credits) Daniel Shannon, Regional Marketing Director, Putnam Investments 1 PA State Insurance CE Credit (Pending)
9:25-10:15am	→		*Ten Tips to a Successful Practice* (Not approved for CFP® CE credits) Diane MacPhee, CFP®, Business Coach, DMAC Consulting Services, LLC 1 PA State Insurance CE Credit (Pending)
10:20-10:35am	Break with Sponsors		
10:35-10:45am	A Word from our Platinum Sponsor, Ace Premier		
10:45-11:45am	**Morning Keynote Address:** ***Market & Economic Insights: Investing Among a Fiscal Cliff, Sequestration and Easy Money Policies*** **Presented by: David Kelly, CFA** 1 CFP® CE Credit (Approved), 1 PA State Insurance CE Credit (Pending)		
11:45-12:45pm	Lunch		
12:45-1:40pm	*Using Social Security Strategies to Optimize Retirement Benefits* William Meyer, Founder, Social Security Solutions, Inc. 1 CFP® CE Credit (Approved) 1 PA State Insurance CE Credit (Pending)	OR	*Targeting the Rich: Liability Lawsuits and the Threat to Families with Emerging and Established Wealth* David Spencer, Senior Vice President/Director, ACE Private Risk Services 1 CFP® CE Credit (Approved) 1 PA State Insurance CE Credit (Pending)
1:40-1:55pm	Break with Sponsors		Break with Sponsors
1:55-2:50pm	*American Taxpayer Relief Act of 2012 Workshop* John Kilroy, CPA, CFP® 1 CFP® CE Credit (Approved) 1 PA State Insurance CE Credit (Pending)	OR	*Stop Asking for Referrals! (And Get More Than You Ever Have Before)* (Not approved for CFP® CE credits) Stephen Wershing, CFP® 1 PA State Insurance CE Credit (Pending)
2:50-3:05pm	Break with Sponsors		
3:05-4:15pm	**Afternoon Keynote Address:** ***Common Sense Philosophies for Investing*** **Presented by: John Bogle, Industry Icon** 1.5 CFP® CE Credits (Approved), 1 PA State Insurance CE Credit (Pending)		

This expanded program offers the flexibility to choose which program you wish to attend.
You are able to choose from session A or B where indicated.

**** Please note that you must arrive on time and complete a session to receive full CE credit ****

PROGRAM

Morning Keynote Speaker: David Kelly, CFA



Market & Economic Insights: Investing Among a Fiscal Cliff, Sequestration and Easy Money Policies

Chief Global Strategist of J.P. Morgan Funds, Dr. David Kelly, CFA, helps to simplify and easily communicate difficult and complex economic and market issues that advisors may find useful in sharing during client meetings and presentations. Using the popular Market Insights quarterly resource "Guide to the Markets," Dr. Kelly demonstrates valuable talking points and observations regarding debt and deficit policies from Washington, Federal Reserve monetary philosophies and decisions as well as broader market valuations and long-term investment perspectives. In understating and properly communicating many of the topics Dr. Kelly addresses, advisors may enhance investor behavior through improved client meetings and a focus on long-term strategies.

With over 20 years of experience, Dr. Kelly provides valuable insight and perspective on the economy and markets to thousands of financial advisors and their clients. Throughout his career, David has developed a unique ability to explain complex economic and market issues in a language that financial advisors can use to communicate to their clients. He is a keynote speaker at many national investment conferences. David is also a frequent guest on CNBC, and other financial news outlets and is widely quoted in the financial press. David is a CFA charterholder. He also has a Ph.D. and M.A. in Economics from Michigan State University and a B.A. in Economics from University College Dublin in the Republic of Ireland.

Ethics in Action

Dan Candura, CFP®, Founder, Candura Group, LLC

This Course covers six learning objectives as they apply to insurance producers:

- Demonstrate an understanding of, and be able to define, financial planning, the financial planning process, and financial planning subject areas
- Describe the material elements of financial planning
- Determine if a CFP® professional is providing financial planning or material elements of financial planning
- Demonstrate an understanding of the required elements of a written agreement when financial planning services are provided
- Articulate disclosure requirements and apply disclosure requirements to their practices
- Define and outline elements of the fiduciary standard and know when it applies

How to Leverage Tablets and Social Media in Your Business

Daniel Shannon, Regional Marketing Director, Putnam Investments

In this session, Mr. Shannon will cover:

- Using news feeds and media aggregation apps services for efficiency
- Document sharing/file management applications
- Other financial services applications to be aware of
- Using LinkedIn for its various applications as a prospecting tool - tips and ideas for making targeted contacts and introductions

Ten Tips to a Successful Practice

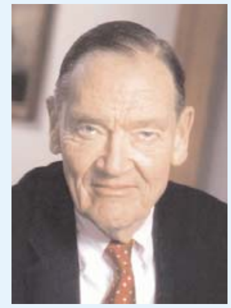
Diane MacPhee, CFP®, Business Coach, DMAC Consulting Services, LLC

Diane MacPhee is a CFP® and PCC (Professional Certified Coach). She is a nationally recognized expert in Practice Management and has worked with hundreds of advisors across the country. In her high energy and dynamic style, she will examine the behaviors that she has seen firsthand to be the ones that contribute to breakthrough success. If lack of confidence, operational inefficiency and/or a stigma around marketing has plagued you thus far - come learn how you can turn that situation around.

Diane is all about developing strategy, executing action, keeping positive momentum sustainable and assessing the results to hold yourself accountable. Do not miss this session - it could be your solution to moving forward.

PROGRAM

Afternoon Keynote Speaker: John Bogle - Industry Icon



Common Sense Philosophies for Investing

The founder and former chairman of The Vanguard Group, the world's largest no-load mutual fund organization, John Bogle now shares with audiences his proven, common sense philosophies for investing. No matter what your investment experience, Bogle's practical and unique insights can be used immediately as a springboard to success. Bogle understands how important a simple investment strategy is; now he shows audiences how a simple investment strategy can result in investment success-and how counterproductive emotions can forfeit that investment success.

John Bogle created Vanguard in 1974 and served as chairman and chief executive officer until 1996 and senior chairman until 2000. He had been associated with a predecessor company since 1951, immediately following his graduation from Princeton University, magna cum laude in Economics. In 2004, TIME magazine named Bogle as one of the world's 100 most powerful and influential people and Institutional Investor presented him with its Lifetime Achievement Award. In 1999, FORTUNE designated him as one of the investment industry's four "Giants of the 20th Century." In the same year, he received the Woodrow Wilson Award from Princeton University for "distinguished achievement in the nation's service." In 1997, he was named one of the "Financial Leaders of the 20th Century" in Leadership in Financial Services (Macmillan Press Ltd., 1997).

Using Social Security Strategies to Optimize Retirement Benefits

William Meyer, Founder of Social Security Solutions, Inc.

Social Security is complicated and overwhelming for clients. Clients are expecting advice from their financial professional since the Social Security Administration agents are prohibited from giving advice. Yet, most advisors aren't prepared for its complexity and don't fully understand its impact on overall retirement income planning. In this presentation, advisors will learn why Social Security is so important for their clients, what a claiming strategy is and why it matters, as well as how strategy impacts portfolio longevity.

Targeting the Rich: Liability Lawsuits and the Threat to Families with Emerging and Established Wealth

David Spencer, Senior Vice President/Director, ACE Private Risk Services

Personal Liability? An umbrella insurance policy? That sounds uninteresting, daunting and complicated. This session will reveal serious concerns your wealthy clients have about protecting their hard earned investible and tangible assets from emotionally and financially devastating lawsuits and how you can easily start the conversation with five simple questions. As one lawyer succinctly summed it up, "I can't tell you how many people, after a financially devastating lawsuit, said to me, 'I wish someone had talked to me beforehand about the risks I was facing and what it might cost.'"

American Taxpayer Relief Act of 2012 Workshop

John Kilroy, CPA, CFP®

This session will provide "heads up", "gotcha", and "planning opportunity" moments as a result of recent tax legislation. We may even add a thought or two about the latest Presidential budget proposal. John Kilroy maintains a sole proprietor tax and accounting practice in the Philadelphia area, specializing in tax planning and preparation for individuals, corporations, partnerships, estates and trusts.

Stop Asking For Referrals! (And Get More Than You Ever Have Before)

Stephen Wershing, CFP®

This session will present new research in referral behavior. At the end of the program, you understand the motivation for referral behavior, what the advisory business has gotten wrong about it traditionally, why asking for referrals puts stress on the client relationships, how to design your practice to clarify what particular value you offer your target clients, and specific communication strategies to help your clients understand clearly the value you offer and how it is different than what other advisors offer. We will also review some specific strategies for engaging in conversations that are alternatives to the old "Who do you know?" type of requests for referrals that advisors have traditionally engaged in.

26th Annual Spring Symposium

6.5 CFP® CE Credits (Approved)
(includes 2 credits for Ethics)
6 PA & DE State Insurance CE Credits (Pending)

Breakfast and Lunch Included

PLEASE NOTE!

YOU MUST HAVE YOUR INSURANCE LICENSE NUMBER TO RECEIVE CE CREDIT.

REGISTRATION FORM

Please Print
Must fill in all lines completely

Name:____

Guest Name: ____

Company:____

Address:____

____

City: ______________________ State: ______ Zip Code__________

Phone: ___________ E-Mail: ____________________________

FPA Member: $195_______ Indicate Here if New Member: ________

Non-Member: $250_______

Student: $80________ **MUST BE A FULL TIME STUDENT**

Total Enclosed: __________

If paying by credit card, you must go to our website at: www.fpaphilly.org and register there. **No credit card payments will be accepted at the door or by fax.**

If paying by check, please make checks payable to: FPA Philadelphia and mail with your registration form to: FPA Philadelphia Tri-State Area, P.O. Box 38, Fairless Hills, PA 19030.

****Cancellation Policy: Written notification 72 hours prior to Symposium for refund. No-shows will be billed.***

Directions

From New Jersey and East

Take the Pennsylvania Turnpike westbound to Exit 326 (old Exit 24) at Valley Forge. Follow signs for Route 202 South/West Chester Exit 328 (old Exit 26A). Continue on Route 202 South to the Great Valley Exit (Route 29 North). At the first traffic light, turn left onto Swedesford Road. Then take the first left turn into the Penn State Great Valley campus. As you enter the driveway into the campus, the Main Building is on the right, and the Conference Center Building is on the left.

From Reading and West

Take the Pennsylvania Turnpike eastbound to Exit 326 (old Exit 24) at Valley Forge. Follow signs for Route 202 South/West Chester Exit 328 (old Exit 26A). Continue on Route 202 South to the Great Valley Exit (Route 29 North). At the first traffic light, turn left onto Swedesford Road. Then take the first left turn into the Penn State Great Valley campus. As you enter the driveway into the campus, the Main Building is on the right, and the Conference Center Building is on the left.

From West Chester, Delaware, and South

Take Route 202 North to the Great Valley Exit (Route 29 North). Turn right at the end of the ramp and turn right again at the light onto Route 29 North. Continue to the next traffic light and turn right onto Swedesford Road. Continue approximately 2/10s of a mile to the Penn State Great Valley campus on the right. As you enter the driveway into the campus, the Main Building is on the right, and the Conference Center Building is on the left.

From Allentown and North

Take I-476 South to Exit 16 to merge onto I-76 West toward Valley Forge. Take Exit 328B-A to merge onto US-202 South toward West Chester. Take the exit toward PA-29 N/Great Valley. At the first traffic light, turn left onto Swedesford Road. Then take the first left turn into the Penn State Great Valley campus. As you enter the driveway into the campus, the Main Building is on the right, and the Conference Center Building is on the left.

From Philadelphia

Follow the Schuylkill Expressway (Route 76 West) to Valley Forge. Then follow signs for Route 202 South/West Chester Exit 328 (old Exit 26B). Take Route 202 South to the Great Valley exit (Route 29 North). At the first light, turn left onto Swedesford Road. Then take the first left turn into the Penn State Great Valley campus. As you enter the driveway into the campus, the Main Building is on the right, and the Conference Center Building is on the left.

From King of Prussia, Norristown

Follow Route 202 South to the Great Valley exit (Route 29 North). At the first traffic light, turn left onto Swedesford Road. Then take the first left turn into the Penn State Great Valley campus. As you enter the driveway into the campus, the Main Building is on the right, and the Conference Center Building is on the left.

From the Philadelphia Airport

Exit the Airport and follow the signs for I-95 South towards Delaware. Travel on I-95 South approximately 5 miles. Take I-476 North -- Exit No. 7 -- towards Plymouth Meeting. Travel on I-476 North approximately 15 miles. Take I-76 West -- Exit No. 16B -- towards Valley Forge. Travel on I-76 West approximately 4 miles. Take US 202 South -- Exit No. 328A -- towards West Chester. Travel on US 202 South approximately 7 miles. You will see one exit information sign for Penn State Great Valley. Take the exit marked PA 29 North - Great Valley. Proceed along exit ramp to the traffic light at the end of the exit ramp. At this traffic light, make a left turn onto Swedesford Road. Make first left turn into the Penn State Great Valley campus. As you enter the driveway into the campus, the Main Building is on the right, and the Conference Center Building is on the left.

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