# 32nd Annual Spring Symposium Agenda

| May 15, 2019 | |
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| 8:00 am to 8:45 am | Registration, Breakfast, Networking with Sponsors |
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| 8:45 am to 9:00 am | Welcome Remarks - Auditorium |
| 9:00 am to 10:00 am<br>**(CFP® CE Approved, PA Ins. CE Approved)**<br>**Auditorium** | **General Session – Keynote Speaker**<br>“Retaining Heirs: How to Connect with the Next Generation of Clients”<br>**Speaker**: Ryan Donohue, Advisor Education Specialist, Vanguard |
| 10:00 am to 10:10 am | Break with Sponsors |
| 10:10 am to 11:10 am | Breakout Sessions |
| Breakout Session I<br>**(CFP® CE Approved, PA Ins. CE Approved)**<br>**Auditorium** | “Using Option Strategies for Financial Planning Solutions”<br><br>**Speakers**: Jim Murphy, CFP®, CAIA, Director of Business Development & National Sales Manager, Innovative Portfolios and Paul Meinville, Vice President, Eastern Region, Innovative Portfolios |
| Breakout Session II<br>**(CFP® CE Approved)**<br>**Room 205/206** | ”Diversity in America & Its Impact on Financial Planning”<br><br>**Speaker**: Marguerita Cheng, CEO, Blue Ocean Global Technology |
| 11:10 am to 11:25 am | Break with Sponsors |
| 11:25 am to 12:25 pm<br>**(No CE Approved)**<br>**Auditorium** | **General Session – Keynote Speaker**<br>“Marketing Magnetism: Strategies for Acquiring **NEW** Business by Standing Out from the Competition””<br><br>**Speaker:** Maribeth Kuzmeski, President, Red Zone Marketing |
| 12:25 to 1:15 pm | **LUNCH – Seating in Auditorium and Outside Patio** |

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| Breakout Session I<br>**(CFP® CE Approved)**<br>**Auditorium** | “Managing Investor Behavior”<br><br>**Speaker**: Eben Burr, Managing Director, Toews |
| Breakout Session II<br>**(No CE Approved)**<br>**Rooms 205/206** | “Adviser Marketing 2020: Best Practices for Growing Your Advisory Business” A Panel Discussion<br><br>**Panelists:** Christine Palmer Hennigan, Chartered Financial Consultant,1847 Financial; David Geibel, Senior VP and Managing Director of Relationship Development, Girard; Brent Weiss, CFP®, Co-Founder, Facet Wealth; Moderator, Joseph Anthony, President, Gregory FCA |
| 2:15 pm to 2:30 pm | Break with Sponsors |
| 2:30 pm to 3:30 pm | Breakout Sessions |
| Breakout Session I<br>**(CFP® CE Approved)**<br>**Room 205-206** | “Global Investing in Direct Real Estate”<br><br>**Speaker:** Gregory Marcy, Vice President, Alternative Investments, Nuveen |
| Breakout Session II<br>**(CFP® CE Approved, PA Ins. CE Approved)**<br>**Auditorium** | “National & Regional Economic Update”<br><br>**Speaker:** Leigh-Ann Wilkins, Economic Outreach Associate, Federal Reserve Bank of Philadelphia |
| 3:45 pm to 4:45 pm<br>**(CFP® CE Approved, PA Ins. CE Approved)**<br>**Auditorium** | **General Session – Keynote Speaker**<br>“9 Critical IRA Errors Advisors Must Avoid”<br>**Speaker:** Jeffrey Levine, CPA/PFS, CFP®, CWS®, MSA, Director of Advisor Education, Kitces.com |