



OF GEORGIA

# 2018 FPAGA Regional Symposium

## ELEVATE

*Practice . Ownership . Ethics . Technology.*

7:00	8:00	Registration and Breakfast		
8:00	8:15	Welcome and Announcements – Salon "F"		
8:15-9:15		<b>General Session – Salon "F"</b> <b>Bill Winterberg: FP Pad</b> Using Technology to Enhance the Advice You Provide Your Clients		
9:15	9:30	Break to Visit with Partners		
9:30	10:30	<b>Concurrent Break Out Session #1</b>		
		<b>Salon "C"</b>	<b>Salon "D"</b>	<b>Salon "F"</b>
		<b>Creating a Family Legacy and Engaging the Next Generation</b> Christy Eckoff <i>(1 CFP CE, 1 GA Ins.)</i>	<b>Reverse Mortgages: The Cinderella of Retirement Planning</b> Harlan Accola <i>(1 CFP CE, 1 GA Ins.)</i>	<b>Restrictive Covenants &amp; The Broker Protocol</b> Tom Potter Chip Collins <i>(1 CFP CE, 1 GA Ins. applied for)</i>
10:30	10:45	Break to Visit with Partners		
10:45	11:45	<b>Concurrent Break Out Session #2</b>		
		<b>Salon "C"</b>	<b>Salon "D"</b>	<b>Salon "F"</b>
		<b>Propel Your Business By Optimizing &amp; Owning Your Tech Decisions</b> Stephanie Macon	<b>Being Broke Ain't Sexy!</b> Eric Smith <i>(1 CFP CE, 1 GA Ins.)</i>	<b>Economic Update</b> Atlanta Federal Reserve <i>(1 CFP CE)</i>
11:45	12:15	Lunch ~ Partners Welcome / HONORS Ceremony - Salon "F"		
12:15 – 2:15 pm		<b>Keynote – Salon "F"</b> <b>Bonnie Kitchner, Sea Change: CFP Board Ethics 2018: enhancing your ethical intelligence</b> <i>(2 hours CFP CE, 2 GA Ins.)</i>		
2:15	2:30	Break to Visit with Partners		
2:30	3:30	<b>Concurrent Break Out Session #3</b>		
		<b>Salon "C"</b>	<b>Salon "D"</b>	<b>Salon "F"</b>
		<b>What a Financial Planner Must Know About Estate Disputes</b> Eric Broel <i>(1 CFP CE, 1 GA ins applied for)</i>	<b>Georgia Business Tax Credits</b> Betsi Barrett <i>(1 CFP CE)</i>	<b>Key Steps Needed to Scale Your Practice Through Technology</b> Garrett Oakley <i>(1 CFP CE applied for)</i>
3:30	3:45	Break to Visit with Partners		
3:45-4:55		<b>Keynote – Salon "F"</b> <b>Bob Veres: The Six Dimensions of Client Service</b> <i>(1.5 CFP CE, 2 GA Ins.)</i>		
4:55	5:00	Closing Remarks & Conference Adjourned		
5:00	6:30	<b>Reception- Don't Rush Into Traffic! Join us for Food, Drinks and be present for your chance to win an Apple Watch!</b>		

\*Speakers and times subject to change

\*\*Presentations with approved CE are marked