



Wednesday, May 19	Workshop/Event	Host/Speaker	CE Credit
7:30 - 8:00 AM	Pre-Conference Coffee & Conversation	Kristin Pugh, CFP®, FPA of GA President	
8:00 - 8:15 AM	Welcome and Opening Address	Kristin Pugh, CFP®, FPA of GA President	
8:15 - 9:15 AM	RIA Outlook and the Role of the Emotionally Intelligent Advisor	Peter Mallouk, JD, MBA, President Creative Planning	
9:15 - 9:30 AM	Speed Networking!		
9:30 - 10:30 AM	More Than Just Biases: An Introduction to Financial Psychology	Sarah Fallaw, Ph.D, Founder, DataPoints LLC	1 Hour Applied For
10:30 - 10:45 AM	Partner Visit Time - Join Us in the Expo!		
10:45 AM - 12:00 PM	Diversity and Inclusion in Financial Planning: Sympathy or Empathy?	Michael Thomas JR., Ph.D, AFC®, Professor, University of Georgia	1 Hour Applied For
12:00 - 1:00 PM	Human vs. Robo-advisor. Who is Here to Stay?	Louis Retief, Co-founder & CEO of Hubly Ron Gorodetsky, Co-founder & COO of Hubly	1 Hour Applied For
1:00 - 3:00 PM	The CFP® Board New Code of Ethics and Standards of Conduct Updated Course	Melissa Kemp, CFP®, AEP, CAP, CNAP®, Executive Director, FPA Greater Phoenix	2 Hours of Ethics
3:00 - 3:30 PM	Concurrent Partner Workshops		
	Mid-Year Market Outlook Discussion	Bryce Gill, Economist, FirstTrust	
	Key Takeaways From the 2020 RIA Benchmarking Study	Sheila Foley, Sr. Business Management Consultant, Schwab	
	How To Sell Your Practice For \$10,000,000 or More	Ted Jenkin, CFP®, CRPC®, CRPS®, AWWA®, AAMS®, CMFC®, CEO of Hyperchat Social	
3:30 - 4:30 PM	RIA Panel: M&A and Succession Planning in a Time of Consolidation	Aradhana Gupta Kejriwal, CFA, Practical Investment Consulting (PIC) James Loftin, AIF®, CFP®, CKA®, CIMC, RFC®, GER LOFTIN Wealth Advisors, Martine Lellis, CPA, CFP®, Mercer Advisors Roger Green, President & CEO, Green Financial	1 Hour Applied For
4:30 - 4:45 PM	Day One Recap and Giveaway	Kristin Pugh, CFP®, FPA of GA President	

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2021 FPA GA VIRTUAL SYMPOSIUM
LET'S CONNECT!
AGENDA

Day 2

Thursday, May 20	Workshop/Event	Host/Speaker	CE Credit
8:00 - 8:15 AM	Opening Address & Awards Ceremony	Kristin Pugh, CFP®, FPA of GA President	
8:15 - 9:15 AM	Navigating the Current Student Loan Landscape	Betsy Mayotte, President and Founder, TISLA	1 Hour Applied For
9:15 - 9:45 AM	Concurrent Partner Workshops		
	Prospecting the Next Wave of Wealth	Jean Dunn, CFP®, Vice President, T. Rowe Price	
	Post-Pandemic-Philanthropy	Terry Mazany, Senior V.P., Community Foundation, Philanthropy	
	Tax Planning With Home Equity	Harlan Accola, National Reverse Mortgage Director, Fairway Independent Mortgage Corporation	
9:45 - 10:45 AM	Digital Asset Planning	Tiffany McKenzie, Partner, Harrison & Held	1 Hour Applied For
10:45 - 11:45 AM	Achieving 5-7% Cashflow and Create Income for Baby Boomers	Kevin Simpson, Founder, Capital Wealth Planning, LLC Jeff Saut, Advisory Board Member, Capital Wealth Planning, LLC	1 Hour Applied For
11:45 AM - 12:15 PM	Continuing the M&A Panel Discussion with Succession Resource Group (SRG)	David Grau, Jr., MBA, Founder & CEO, Succession Resource Group	
12:00 - 12:15 PM	Lounge Networking Break		
12:30 - 1:00 PM	Concurrent Partner Workshops		
	Equity Outlook and Possible Ways to Take Concentration Risk Out of the S&P 500	Nick Kalivas, Senior Equity Strategist, Invesco	
	AARP Small Business Caregiving Guide	Lee A. Baker, CFP®, AARP Georgia State President & Entrepreneur	
	Global Real Estate Outlook for the Last Half of 2021	Omar Thowfeek, Managing Director of Global Investments, Hines	
1:00 - 2:00 PM	Continuing the Diversity in Finance Discussion	Michael Thomas Jr., Ph.D, AFC®, Professor, University of Georgia	1 Hour Applied For
2:00 - 2:15 PM	Partner Visit Time - Join Us in the Expo: Collect Points for End of Day Giveaway		
2:15 - 3:15 PM	Cryptoassets: A Guide to Bitcoin, Blockchain, and Cryptocurrencies for Investment Professionals	Matt Hougan, Chief Investment Officer, Bitwise Asset Management	1 Hour Applied For
3:15 - 3:30 PM	Speed Networking!		
3:30 - 4:30 PM	Using Form 1040 to Identify Financial Planning Needs and Opportunities	Jeff Rattiner, CPA, CFP®, President, Rattiner's Financial Planning Fast Track®	1 Hour Applied For
4:30 - 5:30 PM	Closing Remarks/Message on Connection and Emotional Intelligence	Kristin Pugh, CFP®, FPA of GA President Jonathan Burman, MA, PMP, CMC, Organizational Psychologist, Arc Advisors	

Thank You 2021 Partners

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