FINANCIAL PLANNING ASSOCIATION
GEORGIA

ANNUAL REGIONAL SYMPOSIUM
MAY 2, 2024

SCHEDULE & SPEAKER BIOS

7:30	8:00	**Registration and Networking Breakfast with our Partners**	
8:00	8:10	**Magnolia Ballroom** **Welcome and Announcements**	
8:10	9:00	**Investing in Your Female Clients: Planning for Their Fabulous Financial Future with Lisa Brown, CFP®, CIMA®, GFP(USA), MBA, Partner & Wealth Advisor, Corient**	
9:05	9:55	**Timely Updates on Private Foundation Giving Matters with Jeffrey Haskell, Chief Legal Officer, & Erik Larsen, CAP®, Director of Business Development, Foundation Source**	
9:55	10:10	Morning Stretch & Partner Break	
		Concurrent Break Out Sessions	
10:10 to 11:00		**Magnolia B**	**Bridgewater**
		Partner Breakout: If A Brokerage Account and an Annuity had a Baby with Len Durso, ChFC, AIF, RIA Territory Manager, Midland Advisory	**Beyond the Surface: Exploring the Untapped Potential of Private Markets with Michael Bell, CEO, Meketa Capital**
11:10	12:00	**Behavioral Finance: A 5-Step Process for Communicating with Empathy with Daniel Crosby, Chief Behavioral Officer, Orion**	
12:00	1:00	**Networking Lunch & Midyear Market Outlook with Matthew Ko, CFA, Portfolio Specialist, Multi-Asset Division, T. Rowe Price, Leslie Olsovsky, Senior Investment Strategist and VP, Dimensional Fund Advisors & Jason Bloom, Director of Global Macro ETF Strategy, Invesco**	
1:00	1:50	**Using Retirement Plans to Decrease Tax Liability for Business Owners with Justin Bonestroo, President, American Society of Pension Professionals and Actuaries**	
1:50	2:10	Afternoon Stretch & Partner Break	
2:10	3:10	**Partner Roundtables**	
3:10-4:00		**Generative AI: Moving Beyond the Hype & Hysteria with Bill Franks, Director of the Center for Data Science and Analytics at Kennesaw State University**	
4:00-4:50		**Estate Tax Update: Planning Before 2026 with Nick Djuric, Shareholder, Djuric Spratt**	
4:50	5:00	Closing Remarks & Conference Adjourned	
5:00	6:00	**Happy Hour | Mix & Mingle**	

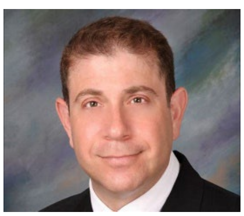
Lisa Brown CFP®, CIMA®, GFP (USA), MBA Over the past two decades I have developed a passion and niche in executive compensation. As co-author of Building Your Wealth Inside Corporate America, Financial Strategies for Today's Executive, my deep expertise includes stock options, 10b5-1 plans, deferred compensation, qualified and non-qualified plans, performance-based rewards, total rewards, and severance packages.

A strategic leader, I bring value in business development and revenue growth experience, serving as chairperson of the national business development committee for a large U.S. financial services firm. I combine my financial acumen and knowledge in executive compensation to attract and retain clients through development of my corporate network and publication of several successful white papers and public speaking engagements.

As author of "Girl Talk, Money Talk. The Smart Girl's Guide to Money After College" and "Girl Talk, Money Talk II. Financially Fit and Fabulous in Your 40s and 50s", I strongly believe everyone needs a financial education, especially women. I frequently lecture at Fortune 1000 companies and women-focused industry events on the topics of executive compensation, economic trends and timely financial issues reported in the media. I have been featured in The New York Times, The Wall Street Journal, CNBC.com, YahooFinance and other media outlets on my financial perspectives, have published three financial books in under three years, and launched a podcast for corporate executives that ran for four years on Apple and Spotify.

Active on non-profit Boards and committees for the past decade including the Atlanta Ronald McDonald House, Family Promise of Forsyth County, Our House, Girls on the Run, and others, I further use my talents to serve my community on a regular basis. I am actively enhancing my skills to serve on for-profit Boards.

Married for 19 years, with three children including a set of twins, a Corgi named Waffles, I love to run (half and full marathons), cycle, golf and cook.



Jeffrey D. Haskell, J.D., LL.M., Chief Legal Officer and Executive Vice President, Foundation Source, the leading provider of enterprise-caliber and technology-led charitable giving solutions. A top expert in the areas of private foundation law, compliance and taxation, Jeff provides guidance on legal and tax issues to the company's private foundation clients and their advisors. He has worked with Foundation Source since its inception in 2001.

Articles by Mr. Haskell have appeared in multiple legal, financial, and philanthropy-related publications such as Trust & Estates, Taxation of Exempts, Family Wealth Report, Kiplinger.com, Wealthmanagement.com, and eJewishPhilanthropy. Additionally, he is a frequent speaker at conferences, and estate and tax planning councils across the U.S. Mr. Haskell is involved in pro bono work for public charities and has served as an adjunct lecturer at Baruch College of Accountancy, where he taught corporate tax law.

Mr. Haskell is a graduate of Yeshiva University and the Benjamin N. Cardozo School of Law, where he was a member of the Cardozo Law Review. He earned a Masters of Law in Taxation from New York University School of Law, where he was a member of the NYU Tax Law Review.

Erik Larsen, CAP®, Director of Business Development, Midcentral Region, for Foundation Source, the leading provider of enterprise-caliber and technology-led charitable giving solutions. He works with high-net-worth and ultra-high-net-worth individuals and families, private wealth managers, financial advisors, attorneys, CPAs, and existing foundations by offering services that make owning and operating a private foundation easy for families or corporations, regardless of size or complexity.

Prior to joining Foundation Source, Erik enjoyed 11 years in the financial services industry as a regional sales consultant at Prudential Annuities, working with financial advisors, RIAs, and wealth managers to help their clients create retirement income solutions, and as a financial advisor at MetLife helping clients manage and protect their wealth, their families, and their businesses.

Erik graduated from Albertus Magnus College with a Bachelor of Science in Business Management. He also holds the designation Chartered Advisor in Philanthropy (CAP®) through The American College of Financial Services.

Leonard Durso, ChFC, AIF, RIA Territory Manager, Midland Advisory. Len is a seasoned professional with over two decades of experience in the dynamic and ever-evolving field of financial services. With a career marked by resilience, strategic thinking, and a commitment to excellence, Len has established himself as a trusted expert in the industry. Over the years, Len has navigated the complexities of financial markets, honing his skills in risk management, investment analysis, and strategic planning. He has worked with renowned financial institutions, contributing his expertise in various roles, from Financial Advisor, National Sales Manager, and Regional Director. As a twenty-year veteran in financial services, Len continues to bring his wealth of experience, strategic acumen, and passion for the industry to every endeavor.

Michael Bell, Chief Executive Officer, Meketa Capital and Primark Capital. Michael has more than 25 years of experience in the investment management and wealth management industries. He is the Chief Executive Officer of Meketa Capital as well as the Founder and Chief Executive Officer of Primark Capital. Prior to Primark, Michael built and was the CEO for a $12 billion RIA, managing more than 30 investment strategies and a $10 billion liquid alternative mutual fund complex that launched more than 50 alternative funds. Most recently, he purchased, grew, and sold a family office-backed $6 billion RIA. Also, he specialized as a corporate finance attorney for Latham & Watkins and was a CPA for KPMG. Michael holds a Bachelor of Science in Commerce from the University of Virginia and a Juris Doctorate from West Virginia University.

Dr. Daniel Crosby is a psychologist and behavioral finance expert who helps organizations understand the intersection of mind and markets. Dr. Crosby's first book, Personal Benchmark: Integrating Behavioral Finance and Investment Management, was a New York Times bestseller. His second book, The Laws of Wealth, was named the best investment book of 2017 by the Axiom Business Book Awards and has been translated into 12 languages. His latest work, The Behavioral Investor, was Axiom's best investment book of 2019 and is a comprehensive look at the neurology, physiology, and psychology of sound financial decision-making. When he is not decoding market psychology, Daniel is a father of 3, a fanatical follower of the St. Louis Cardinals, an explorer of the American South, and an amateur hot sauce chef.

Matthew Ko, CFA is a client portfolio manager/portfolio specialist in the Multi-Asset Division. He is the proxy portfolio manager for the suite of target risk asset allocation products and communicates the firm's global capital markets outlook and asset allocation viewpoints. Matt is a vice president of T. Rowe Price Group, Inc.

Matt's investment experience began in 2001, and he has been with T. Rowe Price since 2016, beginning in the Investment Specialists Group. Prior to this, Matt was employed by Putnam Investments where he was the primary liaison between portfolio managers, research analysts, and clients. He also worked alongside the product management team to further develop and launch new products.

Matt earned a B.B.A. in finance from James Madison University. Matt also has earned the Charted Financial Analyst® (CFA) designation. He is a member of the CFA Society of Washington, D.C. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute.

Leslie Olsovsky is a Senior Investment Strategist and Vice President in the Investment Solutions Group, which is responsible for supporting the effective communication of Dimensional's investment approach and strategies to the firm's clients and prospective clients. She joined the firm's Portfolio Management team in 2016 and managed US equity and REIT portfolios. Leslie currently serves as co-chair of the Women's Inclusion Network at Dimensional.

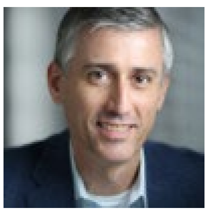
Before coming to Dimensional, Leslie was a consumer insights analyst at MediaMath, a startup technology firm, where she managed solutions for internal and client-facing reporting needs. She obtained an MBA from the McCombs School of Business at the University of Texas at Austin in May 2016. Leslie also has a Bachelor of Science in mathematics and economics, with a minor in natural sciences, from the University of Southern California.

Jason Bloom is the Director of Global Macro ETF Strategy for Invesco's family of exchange-traded funds (ETFs). In his role, Mr. Bloom is responsible for providing a macro market outlook across all asset classes globally, in addition to leading the team's specialized efforts in fixed income, commodity, currency, and alternatives research and strategy. He joined Invesco in 2015.

Prior to joining Invesco, Mr. Bloom served as an ETF strategist for six years with Guggenheim Investments and then River Oak ETF Solutions, where he helped launch several funds focused on both energy and volatility-related strategies. Previously, he spent eight years as a professional commodities trader specializing in arbitrage strategies in both the energy and US Treasury markets.

Justin Bonestroo, MSPA, EA, CPC, CPFA, Senior Vice President, CBIZ Retirement Plan Services. He partners with Certified Public Accountants (CPA) and advisors to help ensure the plans they implement for prospects and mutual clients will grow and continue to help meet their client's goals and expectations.

He also serves as President, American Society of Pension Professionals and Actuaries. Justin enjoys hiking and camping with his wife, Cally, daughter, Claire, and son, Case. He plays basketball and football and rides his motorcycle in his free time. He is currently restoring his first car, a 1967 Mustang, that he bought when he was 14.



Bill Franks is the Director of the Center for Data Science and Analytics at Kennesaw State University. He is also Chief Analytics Officer for The International Institute For Analytics (IIA) and serves on several corporate advisory boards. Franks is also the author of the books Winning The Room, Taming The Big Data Tidal Wave, The Analytics Revolution, and 97 Things About Ethics Everyone In Data Science Should Know.

He is a sought-after speaker and frequent blogger who has over the years been ranked a top global big data influencer, a top global artificial intelligence and big data influencer, a top AI influencer (both here and here), and was an inaugural inductee into the Analytics Hall of Fame. His work, including several years as Chief Analytics Officer for Teradata (NYSE: TDC), has spanned clients in a variety of industries for companies ranging in size from Fortune 100 companies to small non-profit organizations. You can learn more at http://www.bill-franks.com.

Nick Djuric joined Djuric Spratt after practicing trusts and estates law for more than 20 years at Eversheds Sutherland (formerly Sutherland Asbill & Brennan). Nick practices primarily in estate, gift, and generation-skipping transfer tax; wills, trusts, and administration of estates; tax controversies; fiduciary litigation; and private foundations. In particular, he works closely with private family offices and their professional advisors on multigenerational estate planning. As former chair of the Legislation Committee and chair of the Code Revision Committee of the State Bar of Georgia Fiduciary Law Section, Nick has been active for many years in the reform of Georgia's law of trusts and estates. Before he began practicing law, Nick was a law clerk for Chief Judge Gerald Bard Tjoflat of the U.S. Court of Appeals for the Eleventh Circuit.