Saturday, June 8 2019

6/8 12:30PM–6:00PM	**PFP19101A. Building a Tax and Financial Planning Advisory Business Workshop - Day 1**

Sunday, June 9 2019

6/9 1:00PM–5:00PM	**PFP19101B. Building a Tax and Financial Planning Advisory Business Workshop - Day 2**
6/9 1:00PM–5:00PM	**PFP19102. PFP Workshop To Be Annouced**
6/9 5:10PM–6:00PM	**PFP19103. Town Hall**

Monday, June 10 2019

6/10 7:00AM–7:50AM	**PFP19ER01. Session Topic To be Announced**
6/10 7:00AM–7:50AM	**PFP19ER02. Alternative Fee Structures**
6/10 7:00AM–7:50AM	**PFP19ER03. Developing a Sound Investment Policy for Your Client**
6/10 8:00AM–9:15AM	**PFP1901. Economic Update** Anirban Basu
6/10 9:30AM–10:45AM	**PFP1902. Retirement Assumptions**
6/10 9:30AM–10:45AM	**PFP1903. Financial Planning Software**
6/10 9:30AM–10:45AM	**PFP1904. 529s Planning**
6/10 9:30AM–10:45AM	**PFP1905. Session Topic To be Announced**
6/10 9:30AM–10:45AM	**PFP1906. Panel Perspectives - The Tax CPA, the RIA CPA, and the Insurance Broker CPA**
6/10 11:15AM–12:05PM	**ENG1901. Estate Planning for IRAs (EST, PFP)**
6/10 11:15AM–12:05PM	**PFP1907. Successes and Failure with Mergers**
6/10 11:15AM–12:05PM	**PFP1908. Why Trusts**
6/10 11:15AM–12:05PM	**PFP1909. Latest Research on Risk Tolerance**

6/10 11:15AM–12:05PM

PFP1910. P&C Insurance Review for the Financial Planner

Patti Clement - *Senior Vice President, Hub International*

As a financial planner, one of the many important aspects of a portfolio that needs to be addressed with care is making sure clients and their families are properly insured to protect their homes, cars, most prized possessions, and overall current lifestyle. During this session, Patti Clement, Senior Vice President of leading global insurance brokerage, HUB International, will review the latest trends in the personal insurance property and casualty market; how to work with your customers to ensure they have the right coverage to fit their unique needs; uncovering any hidden or commonly overlooked exposures; adapting to today's current landscape including erratic weather patterns, the Me Too movement and much more. Learning Objectives:
1) A detailed overview of commonly purchased lines of insurance coverage for individuals.
2) Current state of the insurance marketplace for personal lines.
3) Insight on commonly overlooked exposures. - Case study examples of how working with the right insurance broker can greatly benefit a financial planner and in turn their customers.

6/10 1:30PM–2:45PM

ENG19K01. The Fat Tail: The Power of Political Knowledge for Strategic Investing

Ian Bremmer - *President & Founder, Eurasia Group*

The fallout from the still-unfolding global financial crisis provides several perfect examples of "fat tail" risk, those that flow from the low-probability, high-impact events that generate upheaval more often than we think. Bremmer shares with audiences how an understanding of the political dynamics generated by the financial crisis helps us forecast market risks, why politics matter more than ever for market performance, why the world's wealthiest countries have begun to behave like emerging market states, and what all this means for investors and companies.

At this presentation audiences will learn:
1) The risks that flow from low-probability, high-impact events...like the global financial crisis
2) Why politics matter more for the performance of markets and for issues ranging from defaults to nationalization to regulatory reforms
3) Why developed states are behaving more like emerging markets
4) The shift from New York, Shanghai, and Mumbai to Washington, Beijing, and Delhi—and the risks that this trend creates

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6/10 3:45PM–4:35PM

PFP1911. How to Motivate and Retain Talent

6/10 3:45PM–4:35PM

PFP1912. Comparison of ETFs vs Mutual Funds

6/10 3:45PM–4:35PM

PFP1913. Alternatives for LTC Options

6/10 3:45PM–4:35PM

ENG1902. Dealing with Grieving Clients (EST, PFP)

6/10 3:45PM–4:35PM

ENG1903. Roth Conversion After the TCJA (PFP, EST)

6/10 4:50PM–6:05PM

ENG1904. State Estate Issues (EST, PFP)

6/10 4:50PM–6:05PM

PFP1914. Retirement Planning

6/10 4:50PM–6:05PM

PFP1915. Annual Technology Survey

6/10 4:50PM–6:05PM

PFP1916. Information-Based on Economic Cycle

6/10 4:50PM–6:05PM

PFP1917. Find Gold in Your Life Insurance Policy When You Sell Your Business

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Tuesday, June 11 2019

6/11 7:00AM–7:50AM

PFP19ER04. HSAs

6/11 7:00AM–7:50AM

PFP19ER05. Integration of Behavorial Finance with Options

6/11 7:00AM–7:50AM

ENG19ER01. Tax Planning for Cyptocurrency (TAX, PFP)

6/11 8:00AM–9:15AM

PFP1918. Session Topic To be Announced

6/11 8:00AM–9:15AM

PFP1919. Family Business Succession Planning

Amy Jucoski - *Managing Director, Legacy and Wealth Planning, Abbot Downing,Wells Fargo*
Nancy Amick - *Senior Director, Institute for Family Culture, Abbot Downing*

Family owned and operated businesses face unique challenges when preparing for and executing succession planning from one generation to the next. As family business owners contemplate passing the torch to the next generation, thoughtful preparation is key. The most successful businesses are proactive about identifying their future leaders and making an investment in their development. In this presentation, we will discuss current trends in succession planning, why it can be difficult to get started and best practices for engaging and preparing the next generation for increased responsibilities as part of a comprehensive approach to business transition planning. Learning Objectives:
1) Understand the unique opportunities and challenges faced by family business owners who are contemplating succession planning
2) Provide best practices for engaging and preparing the next generation for increased responsibilities in the family business

6/11 8:00AM–9:15AM

PFP1920. Session Topic To be Announced

6/11 8:00AM–9:15AM

PFP1921. Longevity Annuities

Stuart Silverman - *Principal & Consulting Actuary, Milliman*

6/11 8:00AM–9:15AM

ENG1905. 199A (EST, PFP, TAX)

Robert Keebler - *Partner, Keebler and Associates, LLP*

6/11 9:30AM–10:20AM

PFP1922. Psychology of Retirement

6/11 11:20AM–12:10PM

ENG1907. How to Move to a Zero-Tax State (TAX, PFP, EST)

Mark Klein - *Esquire, Hodgson Russ LLP*

The impact of the TJCA on the deductibility of state and local taxes has created an additional incentive for taxpayers in high-tax states to move to a low or no-tax state. This session will help participants to:

1) Identify the rules used throughout the United States to get a state to accept a taxpayer's change of residency;
2) Discuss planning opportunities and traps for the unwary; and
3) Understand the income and other tax implications of changing residency.

6/11 11:20AM–12:10PM

ENG1908. Life Insurance Planning Opportunities After the TCJA (EST, TAX, PFP)

Todd Steinberg

6/11 11:20AM–12:10PM

PFP1923. Topic to be Announced

Michael Kitces - *Publisher | Partner, Nerd's Eye View | Pinnacle Advisory Group*

6/11 11:20AM–12:10PM

PFP1924. Life Planning Tools

6/11 11:20AM–12:10PM

PFP1925. Private Client Investment Strategy Update

6/11 1:25PM–2:40PM

PFP1926. Best Ideas for Retirement Panel

6/11 1:25PM–2:40PM

ENG1911. Planning for Clients with a $2 million to $22 million Estate (EST, PFP, TAX)

Steve Siegel - *President, The Siegel Group*

This session will address how persons not likely to be federal transfer taxpayers should address their income tax and estate planning issues. We will address basis planning, key decisions to be made with existing planning and why and how it may need to be changed. We will address whether existing trusts and wills should be modified, and consider what should be done with a client's life insurance and retirement plans.

Learning Objectives:
1) Gain a general understanding of the best planning considerations and decisions for persons not likely to be federal transfer taxpayers.
2) Review a variety of planning techniques highlighting the importance of income tax planning in today's environment.
3) Address specific suggestions to be addressed with clients to update and improve their planning decisions.
4) Focus on techniques to develop income tax basis enhancement strategies.

6/11 1:25PM–2:40PM

ENG1912. Portfolio Management for Non-Portfolio Managers (PFP, TAX)

6/11 3:40PM–4:30PM

PFP1927. General Session - Topic to be Announced

6/11 4:45PM–6:05PM

PFP1928. Best Planning Ideas Panel

Wednesday, June 12 2019

6/12 8:00AM–9:15AM

ENG19K02. Professional Update

Barry Melancon - *CEO, Association of International Certified Professional Accountants*
William Reeb - *CEO, Succession Institute,LLC*

6/12 9:40AM–10:30AM

ENG19K03. Leading Through Organizational Transformation — A Conversation With Simon Sinek

Simon Sinek - *Author & Speaker*

6/12 11:30AM–12:45PM

ENG1918. IRA Planning Update (TAX, PFP)

6/12 11:30AM–12:45PM

ENG1919. Qualified Small Business Stock Advantages (PFP, TAX)

6/12 11:30AM–12:45PM

PFP1929. Humanizing Technology to Deepen Client Relationships

Cathy Rowe - *Product Manager, Accounting & Audit, Wolters Kluwer*

Technology promises many benefits to today's planners—efficiency, growth, savings and even intelligence. But what about the human side of technology? Often the benefits of technology come at a human cost, primarily frustration, confusion and distraction. More technology, so the establishment believes, is better. But what if better were truly better? This session is a journey through compelling examples of organizations who have embraced the idea that better is better. And the results? By focusing on better technology—and not just more technology—they're seeing bigger AND better results. Learning Objective:
1) Discuss how planners can realize the benefits of technology without the downsides

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6/12 11:30AM–12:45PM

PFP1930. Portfolio Construction

Amy Archer - *Senior Manager, RSM US LLP*

6/12 1:55PM–2:45PM

ENG1921. Aging & Ill Clients (EST, TAX, PFP)

6/12 1:55PM–2:45PM

ENG1922. Marriage & Divorce After 2017 Tax Act (TAX, PFP)

6/12 1:55PM–2:45PM

PFP1931. Niche Marketing

6/12 1:55PM–2:45PM

PFP1932. Session Topic To be Announced

6/12 1:55PM–2:45PM

PFP1933. Health Insurance for Early Retirement

6/12 3:00PM–3:50PM

PFP1936. SALT limitations and charitable planning for tax purposes in general (CRTs, Donor advised funds, bunching, etc.)

Robert Keebler - *Partner, Keebler and Associates, LLP*

6/12 3:00PM–3:50PM

PFP1937. Topic to be Announced

6/12 3:00PM–3:50PM

PFP1934. Medicare Planning

6/12 3:00PM–3:50PM

PFP1935. Client Expeirence

Tracy Harding - *Principal, BerryDunn*

6/12 4:50PM–6:05PM

ENG1928. Social Security Update (PFP, TAX)

Ted Sarenski - *CEO, Blue Ocean Strategic Capital*

6/12 4:50PM–6:05PM

ENG1929. Inspector Gadget (PST, PFP)

David Cieslak

6/12 4:50PM–6:05PM

ENG1930. Advanced Post Mortem Estate Planning (EST, PFP, TAX)

Jeremiah Doyle - *Senior Vice President, BNY Mellon Wealth Management*

Thursday, June 13 2019

6/13 8:00AM–9:15AM

ENG19K04. Stress-Testing America's Prosperity

Zanny Minton Beddoes - *Editor-In-Chief, The Economist*

For years, America's economy has led the rest of the developed world, but will the U.S. remain the global dynamo or is the country's ongoing recovery built on an unsustainable pile of debt? Minton Beddoes examines the economic outlook from American and global perspectives, offering up-to-the-minute insight on policy-makers' priorities and expertise on the likely direction of issues, ranging from job creation to the deficit's effect on global interest rates to potential financial regulation.