

31st Annual Spring Symposium Agenda

May 16, 2018

8:00 am to 8:50 am Registration, Breakfast, Networking with Sponsors

8:50 am to 9:00 am Welcome Remarks

General Session – Keynote Speaker

“How Client Engagement is Being Disrupted”

Julie Littlechild, Founder, Absolute Engagement

10:00 am to 10:10 am Break with Sponsors

10:10 am to 11:10 am Breakout Sessions

“The Past, Present, and Future of Women in Financial Planning”

Breakout Session I
(No CE Approved)
Moderator: Catherine Seeber, CFP®, CeFT®, Vice President,
Financial Advisor, CAPTRUST

Panelists: Cynthia Axelrod, MBA, Assistant Professor Finance Dept.,
Temple University’s Fox School of Business; Joan L. Sharp, CFP®,
Glenayr Wealth Advisors LLC; Jocelyn D. Wright, MBA, CFP®, State
Farm® Chair in Women and Financial Services and Assistant
Professor of Women’s Studies at The American College of Financial
Services

Breakout Session II
(CFP® CE Approved)
(PA Insurance CE Approved)
“How Spending Changes During Retirement: Impact Withdrawal
Strategies”
Derek Tharp, Ph.D., CFP®, CLU®, Research Associate at Kitces.com,
Financial Planner and Founder of Conscious Capital

11:10 am to 11:25 am Break with Sponsors

General Session – Keynote Speaker

“Moving from ROI to ROL: 6 Core Values for Strengthening Client
Relationships”

Mitch Anthony, President, Advisor Insights Inc.

LUNCH

12:25 to 1:15 pm

1:15 pm to 2:15 pm	Breakout Sessions
Breakout Session I (CFP® CE Approved) (PA Insurance CE Approved)	“Accumulating Wealth with Health Savings Accounts” Peter Stahl, CFP®, President, Bedrock Business Results
Breakout Session II (No CE Approved)	“Media Mastery: Representing Yourself, Your Association and Your Profession Through Media” Ben Lewis, Director of PR for FPA
2:15 pm to 2:30 pm	Break with Sponsors
2:30 pm to 3:30 pm	Breakout Sessions
Breakout Session I (No CE Approved)	“Transforming Your Business Through Process, People and Technology” Jennifer Goldman, CFP®, Business Transformation Consultant, Jennifer Goldman Consulting
Breakout Session II (CFP® CE Approved) (PA Insurance CE Pending Approval)	“Changing the Approach to College Funding Advice” Joe Messinger, CFP®, ChFC, CLU, Capstone College Partners
3:35 pm to 4:45 pm (CFP® CE Approved) (PA Insurance CE Approved)	General Session – Keynote Speaker “Setting the Record Straight: Truths About Indexing” James J. Rowley, Jr., CFA, Head of Active/Passive Portfolio Research, Vanguard Investment Strategy Group