FPA NENY Symposium 2017 Speaker Biographies

Matt Sommer, CFA, CFP®, CPWA® is Vice President and leads the Defined Contribution and Wealth Advisor Services team at Janus. In this role, he provides advice and consultation to financial advisors surrounding some of today's most complex retirement issues. His expertise covers a number of areas including regulatory and legislative trends, practitioner best practices, and financial and retirement planning strategies for high-net-worth clients.

Eric Roberge, CFP® is the founder of Beyond Your Hammock, a virtual financial planning company that helps professionals in their 30s do more with their money. Eric helps his clients think like entrepreneurs and use their money as a tool to live life on purpose. His successful transition from a corporate career working for State StreetBank and JPMorgan Chase to business owner at the age of 33 drives him to help others take advantage of their cash flow, live for today, and plan responsibly for tomorrow.

Doug Sandler serves as Chief US Equity Officer, bringing more than 20 years of investment experience to the equity team. In addition, he serves on the firm's Operating Committees. Prior to launching RiverFront, Doug served as Managing Director and Chief Equity Strategist at Wachovia Securities, where he was responsible for all equity advice of the firm.

Bryan Favilla is a director of fixed-income markets at American Funds, part of Capital Group. He has 12 years of investment industry experience and joined Capital Group this year. Prior to joining Capital, Bryan was a member of the fixed-income product management team at Delaware Investments of the Macquarie Group. Before that, he was a vice president of municipal sales and trading at Citigroup Global Markets and a member of the structured products team at Sovereign Bank Capital Markets. He holds an MBA from the Wharton School of the University of Pennsylvania, graduating with honors, and a bachelor's degree in business administration from The College of New Jersey. Bryan is based in New York.

William French is a vice president in the Fidelity Customer Protection and Financial Intelligence Group. His responsibilities span all of Fidelity's distribution channels and include fraud investigations, account protection and Anti Money Laundering efforts under the USA Patriot Act. Before assuming his current responsibilities in 2005, Mr. French spent many years in the Fidelity Risk Oversight Group managing teams focused on directing and developing proactive efforts to identify and mitigate fraud and risk issues. Mr. French often speaks at national conferences and client events to customers, intermediaries and Family Office practices on cyber fraud threats. He educates employees and managers at all levels of an organization on awareness and best practices in how to detect, prevent and report incidents of fraud or suspicious conduct.

Robert Pokorski, M.D. is an internationally renowned lecturer who meets with consumers, the media, and financial advisors to increase awareness of events that can threaten retirement security. He holds an MBA from Heriot-Watt University in Edinburgh, Scotland, and a doctorate of medicine from Creighton University in Omaha, Nebraska. Dr. Pokorski has published papers in *Nature, Cancer,* and *the Journal of Financial Service Professionals*. He has also delivered more than a thousand presentations to audiences worldwide.

Michael Finke, Ph.D., CFP® is the Dean and Chief Academic Officer at The American College of Financial Services. Dr. Finke served as the editor of the Journal of Personal Finance, is a contributing editor at the Research on Wealth Magazine, and serves as a columnist for The Experts on Wealth Management feature in the Wall Street Journal. He received a doctorate in consumer economics from the Ohio State University in 1998 and in finance from the University of Missouri in 2011.

Jamie Hopkins, ESQ., MBA, LLM, CLU®, ChFC®, RICP® is an associate professor of taxation at The American College of Financial Services in the Retirement Income program, and he is the co-director of the New York Life Center for Retirement Income. He also holds the Larry R. Pike Chair in Insurance and Investments at The American College. As a professor at the College, he teaches courses in retirement, estate planning, and life insurance.

Wade D. Pfau, Ph.D., CFA, is a Professor of Retirement Income in the Ph.D. program for Financial and Retirement Planning at The American College in Bryn Mawr, PA. He holds a doctorate in economics from Princeton University and publishes frequently in a wide variety of academic and practitioner research journals on topics related to retirement income. He hosts the Retirement Researcher website.

Dean Skarlis, PhD. is the President and founder of The College Advisor of New York. Dean has spent more than 25 years in the field of higher education, including 6 years as a Consultant at American College Testing (ACT) and nine years as an administrator at Duquesne University and the University of Pittsburgh. A passionate student advocate, Dean has taught at the graduate and undergraduate levels, and has served as a Senior Lecturer at Tiffin University. He holds a B.A. in Psychology from Allegheny College, an M.A. in Psychology from Duquesne University, and a Doctorate in Educational Policy and Administration from the University of Pittsburgh. Dean also earned a certificate from the Harvard University Institute on College Admissions. His research has focused on quality teaching and learning, retention, and program design at four-year colleges. He is a member of the National Association of College Admissions Counseling and the Independent Educational Consultants Association.

Peter Skelton came to KAFL Insurance Resources in 1992 and currently, Peter is the CEO. Peter has been the featured speaker for numerous Professional groups covering topics such as Estate Planning and Long Term Care.

Ryan Meyer is a Brokerage Manager with KAFL. Prior to joining KAFL in 2014 he worked as a financial representative for a local career agency.

Mindy Derosia is the Development Officer for The Community Foundation for the Greater Capital Region

John Lavelle, CPA, LL.M., Founding Partner, Lavelle & Finn, LLP. John is passionate about serving family businesses, protecting wealth, and saving people money. His firm is devoted solely to the important practice areas for his passion: estate planning, tax consulting, and business transactions.

He is particularly thrilled when all three areas can be put together in one engagement, such as the sale of a family business. This multiplies the· impact of the planning and the magnitude of the savings. John and his firm bring this planning to numerous other situations: sales of legacy assets like farms or vacation homes, investment decisions and charitable giving.

Speaker line-up is subject to change.