FPA FINANCIAL PLANNING ASSOCIATION OF NORTHERN NEW ENGLAND

Register now for our

Continuing Education Seminar

Friday, May 4, 2018

Portsmouth Harbor Events*
100 Deer Street, Portsmouth, NH 03801

*Overnight guest rooms available at the Hampton Inn & Suites, Downtown Portsmouth

Join us for a chapter member Meet & Greet event the night before!

See inside for details about the Meet & Greet on Thursday night, May 3!

ATTENTION FINANCIAL PLANNING PROFESSIONALS!

Attend and earn 4.0 CFP CEs and an additional
2.0 CFP CEs for the optional Ethics Program

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May 4, 2018 Seminar Schedule

8:00 AM — **Registration, Continental Breakfast, Meet with Sponsors**

8:45 AM — **Welcome and Sponsor**

9:00 - 9:50 AM — **Data Security: What You Need to Know About Your Company's Vulnerabilities**

(Approval pending for 1.0 CFP CE)

Cameron G. Schilling, Esq., Chair, Privacy and Information Security Practice Group, McLane Middleton, PA, Newington, NH

No organization can completely protect itself from a data breach. However, as a financial planner, there are safeguards you can put into place to secure sensitive information that will go a long way towards minimizing your company's risk of a breach, while reducing potential fines in the event of an attack. With the new SEC regulations on data security, now more than ever, financial planners need to make sure to review their processes so that they are in compliance with this new regulation. Principal knowledge topics will include: current cybercrime trends; review new SEC regulations on data security; a review of how and why financial planners are targets of data attacks; costs associated with breach remediation; the real impact to your organization; elements of a risk assessment and elements of a breach response.

9:50 - 10:00 AM — **Sponsor Presentations**

10:00 - 10:50 AM — **Introduction to §1031 Exchanges**

(Approval pending for 1.0 CFP CE)

Kyle T. Kadish, President, Advantage Wealth Solutions, Bloomfield, CT

This session will explore the tax code, its theory, and rationale as they relate to real property. The session will dispel the many myths that exist for real estate exchanges, including a definition of the phrase 'like-kind', and will review the real estate related sections of the tax code. Participants will learn how to calculate tax consequences, understand safe harbor provisions, and understand necessary guidelines to follow when completing an exchange, which can be applied when advising clients owning investment real estate.

10:50 - 11:00 AM — **Sponsor Presentations**

11:00 - 11:50 AM — **2018 Tax Law Changes**

(Approval pending for 1.0 CFP CE)

CPA to be announced, Baker Newman Noyes, Manchester, NH

BAKER NEWMAN NOYES

Still confused about what made it into the final tax bill? In this session, Baker Newman Noyes CPAs will provide an overview of everything you need to know to help you and your clients understand and prepare for the upcoming tax year.

11:50 AM - 12:00 PM — **Sponsor Presentations**

May 4, 2018 Seminar Schedule

12:00 - 1:00 PM

Lunch with Special Guest Speaker

Aging Healthy, Wealthy & Wise

Coventry Edwards-Pitt, Author of Raised Healthy, Wealthy & Wise and Aged Healthy, Wealthy & Wise

There is much about aging that we can't control. But there is much more that we can. Nationally recognized wealth advisor Coventry Edwards-Pitt applies the success-story format of her highly acclaimed first book, *Raised Healthy, Wealthy & Wise* (2014), to one of today's most pressing issues: how to age well—given our increased longevity—and ensure that our later years have a positive rather than negative impact on our families. Drawing on her many years of professional experience, Covie will discuss the choices elders can make that allow them to live content, engaged, and purposeful later lives and to design legacies of meaning.

1:00 - 1:50 PM

Model Behavior: AI, BIG & Small Data in Quant Models

(Approval pending for 1.0 CFP CE)

Rick Roche, CAIA, Managing Director, Little Harbor Advisors, Marblehead, MA

Get an insider's look into the opaque yet disruptive world of quantitative investing and the emergence of Artificial Intelligence, Machine Learning, Big and small Data.

The presenter will separate fact from fiction and hype from reality. Learn how asset managers are deploying algorithms and advanced statistical modeling to classify and monetize varied and differentiated sources of potential alpha. Although quants have not taken over Wall Street (not yet, anyway), the audience will be surprised to hear just how widespread automated trading systems (ATS) and algorithmic investing are being deployed in today's equity markets.

The presenter reveals some of the largest practitioners of quantitative investment management and emerging players in the quant investing space. Increasingly, asset managers are combining human and machine intelligence in the investment decision-making process. There's a virtual arms race fueled by 500+ alternative data set and technology providers frantically hiring data scientists, computer engineers and math PhDs. No previous investment management experience required!

2:00 - 4:00 PM

Interactive Ethics Workshop*

(Approved for 2.0 CFP Ethics CE)

Dan Candura, Candura Group, Braintree, MA

*Certified Financial Planner Board of Standards Disclaimer: While the materials for the course (Code of Ethics and/or Practice Standards) have been approved by the CFP Board as meeting the established standards for continuing education, the CFP Board does not review the method or means of presentation and therefore makes no representation concerning the delivery of this information to the CFP certificant.

Register online at https://conta.cc/2I5hmG2 using PayPal and a credit card.

Will you need an overnight guestroom at The Hampton Inn & Suites located at 23 Portwalk Place, Portsmouth, NH?

Call the hotel at 603-430-3033 to secure a room at the special FPANNE rate of $169 plus tax when reservations are made by April 10, 2018.

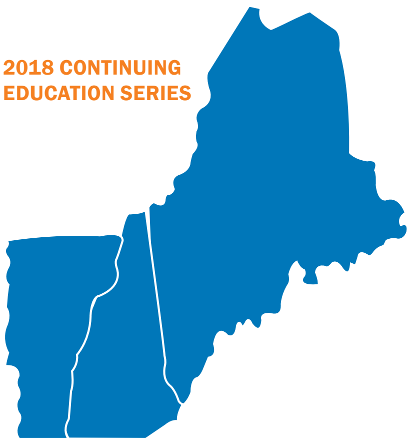
Join Us for an FPA Chapter Member Meet & Greet at Martingale Wharf from 5:30 to 7:30 pm, Thursday, May 3!

Open to all FPA members—registration for the May 4 program is not required to attend the Meet & Greet. Learn more about chapter activities and get to know other members.

FPA FINANCIAL PLANNING ASSOCIATION OF NORTHERN NEW ENGLAND

53 Regional Drive, Suite 1 • Concord, New Hampshire • 03301

2018 CONTINUING EDUCATION SERIES



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REGISTRATION FORM

YOU MAY REGISTER ONLINE AT https://conta.cc/2I5hmG2 USING PAYPAL AND A CREDIT CARD.

Advance Registration Program Cost: $50.00 FPA members, $80.00 non-members

Name (include designations): _______________________________

Company: ____

MailingAddress:_______________________________________

Phone: __________________ Email: _________________________

CFP#:___________________

I am an IAR: ____Yes ____No

I am a FPA chapter member (in good standing) Yes No

I am an RIA: ____Yes ____No If yes, Broker Dealer: ________

My Broker Dealer is:___________________________________

Sign-in sheets will require your CFP number & your Social Security #. Please make check payable to FPANNE. Payment must accompany registration form.

I will attend:

____ May 4, 2018 primary program
(Registration opens at 8:00 am)
FPANNE member: $50 / $70 on-site
Non-Member: $80 / $100 on-site

____ Ethics program 2:00-4:00 p.m. Free to all main program attendees but RSVP is required.

Total Amount Enclosed: ________________

I will attend the Thursday evening, May 3 Member Meet & Greet (5:30-7:00 p.m.) at Martingale Wharf (99 Bow St., Portsmouth)
____ Yes ____ No

Register online or via mail to:
Financial Planning Association of Northern New England
Attention: Seminar Registration
53 Regional Drive, Suite 1, Concord, NH 03301