

33rd Annual Spring Symposium (Virtual) Session Descriptions

May 12, 2020 – Day 1

1:00-2:00 p.m. - “The Importance of a Promise” presented by Kay Spatafore, Chief Operating Officer of *because I said I would*, the international social movement and nonprofit dedicated to the betterment of humanity through promises made and kept.

(No CE)

Kay Spatafore believes that every individual has the strength to become a person of their word. In this session, Kay shares her insights and actionable ways to become better at fulfilling commitments. She inspires others to become more accountable to their promises through compelling and real-life examples from the “because I said I would” movement.

We live in a society that often does not respect the importance of a promise. It is too easy to say "I'll get to it" or "tomorrow." In many ways we have become numb to disappointment and broken commitments. This expectation starts to fade into our character as individuals. Kay Spatafore believes that every individual has the strength to become a person of their word. As the Chief operating officer of an international social movement, Kay shares her insights and actionable ways to become better at fulfilling commitments. She inspires others to become more accountable to their promises through compelling and real-life examples from the because I said I would movement. Kay convincingly illustrates how integrity and keeping your promises are forever interwoven. She discusses how holding ourselves and each other accountable truly changes humanity for the better.

Because I said I would’s work had been featured on CNN, ABC World News with Diane Sawyer, the TODAY Show, Good Morning America, the Steve Harvey Show and many other programs.

2:00-3:00 p.m. – “W&I – Research Masterclass - Building Ideal Relationships with Women Clients” presented by Cesar Bastidas, Director, Practice Management, New York Life Investments
(One hour of CFP® CE approved; One hour of PA Insurance CE pending approval)

This session will be a research masterclass on how to build ideal relationships with women clients in the financial service industry. Mr. Bastidas will identify various client profiles and build a strategy around how to retain and maintain relationships with them. Not only do women have tremendous personal wealth, but they control the overwhelming majority of financial decisions in their households so proper communication with them is key.

May 13, 2020 Day 2

9:00-10:00 a.m. – “The SECURE Act Changes Retirement (and Other) Planning” presented by Jeffrey Levine, CPA/PFS, CFP®, CWS®, MSA, Director of Advisor Education for [Kitces.com](#). Jeffrey is also the Director of Advanced Planning at [Buckingham Wealth Partners](#), and is the Lead Creator and Content Expert for [Savvy IRA Planning®](#), offered through Hoursesmouth.

(One hour of CFP® CE approved; One hour of PA Insurance CE pending approval)

On December 20, 2019, President Donald Trump signed into law the Setting Every Community Up for Retirement Enhancement (SECURE) Act, ushering in the most significant direct changes to the laws for retirement accounts since the Pension Protection Act of 2006. The ‘headline’ from the SECURE Act is its changes to the ‘stretch’ rules for designated beneficiaries, but that’s far from the only change that will impact advisors and their clients. The SECURE Act also changes the starting age for RMDs, eliminates the age limit for Traditional IRA contributions, creates a new exception to the 10% early distribution penalty, eliminates burdensome rules that prevented wider-spread adoption of MEPSs, reversed changes to the so-called “Kiddie Tax” made by the Tax Cuts and Jobs Act, and much more!

In this session, attendees will learn about each of the major changes made by the SECURE Act, exploring both the new challenges, and planning opportunities, it creates.

- Understand how the SECURE Act does (and does not) change the rules for beneficiary RMDs.
- Discover how the change to the starting age for RMDs impacts has ripple effects to other areas
- Explore how the QCD anti-abuse rule can negate much of the benefit to making deductible Traditional IRA contributions at 70 ½ and beyond.
- Prioritize clients whose plans may need to be revised as a result of the SECURE Act’s changes.
- Identify the SECURE Act’s non-retirement-related changes.

10:00-11:30 a.m. – “CARES Act - Coronavirus Stimulus Bill – New Rules, Planning Strategies and Opportunities” presented by Jeffrey Levine, CPA/PFS, CFP®, CWS®, MSA, Director of Advisor Education for [Kitces.com](#)

(1.5 hours of CFP® CE approved; On hour of PA Insurance CE pending approval)

In response to the sudden onset of a pandemic-induced recession, Congress has passed what may be the largest economic stimulus legislation in history. In this webinar, the experts at Kitces.com will walk through the details of the new coronavirus stimulus legislation, key new rules and provisions that advisors should be aware of, immediate planning strategies that can be implemented with clients given the new rules and additional planning opportunities that may be available going forward. In this session Jeff will:

- Identify the provisions in the relief that impact retirees.
- Explore the impact of the bill on student loans and education.
- Determine the amount of recovery rebate a family will receive.
- Understand the payroll tax relief for businesses.
- Discover other important provisions of the bill, such as: enhanced access to retirement account funds, new qualified medical expenses, and expanded unemployment insurance.

11:30 a.m.-12:30 p.m. – “The Power of Cash Flow Planning” presented by Melissa Tosetti, founder of The Savvy Life and author of the international bestseller *Living The Savvy Life*. For the past eight years, she’s worked as an outside resource for financial advisors doing cash flow planning for their clients. (One hour of CFP® CE approved; One hour of PA Insurance CE pending approval)

Attendees at this session will learn how to help their clients find more money for their short, and long term financial goals. It will aid them in creating Spending Plans for those clients, achieving the balance between building a stronger financial foundation and enjoying the journey. They will learn how to teach their clients to become more purposeful in their spending, increasing their quality of life along the way. You will hear:

- The importance of Cash Flow Planning to both the wealthy and the not-wealthy yet
- The importance of benefits of spending plans for clients in or near retirement
- 7 reasons why clients overspend and 6 areas where clients bleed money
- Impact of schedule on spending and help for behavioral spending

May 14, 2020 Day 3

1:00-2:00 p.m. – “Transform Your Business for Generational Success” presented by Jennifer Goldman, CFP®, Business Transformation Specialist, Jennifer Goldman Consulting (One hour of CFP® CE pending approval)

Jennifer will share industry trends of growing firms and actionable techniques and simple tools that improve your people, productivity, profitability, and growth. Jen will share details on change management, productive efficient collaboration, process improvements, staff role career pathing and compensation, and overall, easier staff and business management of a growing firm. The session will end with Q&A and participants will receive a one-page cliff notes primer on all techniques covered.

2:00-3:00 p.m. – “How to Make Working from Home Effective” presented by Jennifer Goldman, CFP®. Jen has 25 years’ experience transforming professional services businesses. She formed the first ever Outsourced COO service and online directory of Providers for RIAs. Jen is published, quoted, and presents to groups that range from FPA, NPAFA, Pershing, Fidelity, Tech Tools to Million Dollar Round Table, CSSI, and The Exchange.

(No CE)

Jennifer will share techniques and ideas that make Working from Home effective. Jen will share ideas for managers and leaders as well as tips on expectations on productivity. This will be an interactive session with Q&A, polls and at least one exercise.

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