

FPA Philadelphia – 35th Annual Spring Symposium
AGENDA/SESSION DESCRIPTIONS

8:00 a.m. – Breakfast/Networking/Visit with Sponsors

8:45-9:45 a.m. – General Session (CFP® CE Credit approved)

<i>General Session – Auditorium</i>
<i>Applying AI to Generate Planning Alpha</i> <i>Presented by: Andrew Altfest, CFP®, MBA, Founder and CEO of FP Alpha</i>

Increasingly, clients are wanting more from their advisors. And the trend towards holistic financial planning solidifies the importance of providing additional services such as tax, estate, and insurance reviews for them. But doing all of this, at scale, has been near impossible. In most cases, advisors have needed to spend significant time on manual processes including reviewing tax returns, wills, trusts, and insurance policies in order to identify appropriate planning insights. Because of this, many advisors have not been able to offer these services to their entire client base, resulting in missed opportunities for both the advisor and the client. In this session we will discuss how, by applying AI to your practice, will allow you to automate, implement, offer and scale comprehensive planning across a variety of disciplines including tax, estate, and insurance.

9:45 a.m. – Break with Sponsors

10:00-11:00 a.m. – Breakout Sessions (CFP® CE approved & PA Ins. CE pending)

Breakout Session I - Auditorium

Understanding & Adapting to the Needs of Clients: Communicating Across Behavioral Styles

Presented by: Barbara Kay, MA, LPC, RCC, Barbara Kay Coaching

Adapting to different client behavioral and communication styles is an important part of effective client communication. This presentation will explain the psychological principles of individual behavioral styles and how they impact client communications. The presentation will teach practical and effective steps to recognize various behavioral styles and adapts to communicate most effectively with each style.

Breakout Session II – Room 205-206

Macro, Markets, Actionable Ideas and Portfolio Construction: The Case for Balance

Presented by: Bryan Favilla, Director of Fixed Income Markets at Capital Group, home of American Funds

This session focuses on helping advisors face the near-term realities of the markets and choosing the right bonds for the right role in a portfolio built for a specific purpose. We'll discuss details and views on Fed policy, the interest rate environment, and inflation outlook. We will also cover topics that apply to the credit and municipal markets. We'll discuss portfolio construction in a low rate environment and the key takeaways from the thousands of advisor portfolios we've reviewed. Questions are welcome pertaining to monetary policy, capital markets, fund/portfolio specifics or unpacking any fixed income topic covered in the popular press.

11:00 a.m. – Break with Sponsors

11:15 a.m. – 12:15 p.m. - General Session (No CE Available for this session)

General Session – Auditorium

I'm Going to Launch My Own Firm...Now What?

Presented by: Alan Moore, CEO & Co-Founder – XY Planning Network

You've decided the call of freedom was too strong to ignore and you're going to take the leap to launch your own financial planning firm. First, congrats! Second, hold on to your hat because you're about to embark on the journey of a lifetime. Will it be hard? Yes. Will it be worth it? Absolutely. But as delectable as that pie-in-the-sky is, it's essential to ground your dreams in reality. So, let's get real about what it really takes to launch your own firm. Join Alan Moore, as he breaks down a million and one things advisors need to think through before becoming firm owners. From pre-registration considerations to who you'll serve and how you'll profitably charge them to what type of firm you want to build and why, Alan will cover the many intricacies of launching, running, and growing your own financial planning firm and offers a roadmap for financial advisors with dreams of independence. The destination? Successful firm ownership.

12:15-1:15 p.m. – Lunch and Break with Sponsors

1:15-2:15 p.m. – Breakout Sessions (CFP® approved & PA Ins. CE pending)

Breakout Session I – Room 205-206

Economic Outlook

Presented by: Kali Aloisi, Economic Outreach Associate, Federal Reserve Bank of Philadelphia

We will discuss the recent economic developments of the state and the region. Topics will include, but not limited to: What has improved in the past 6 months?; What are current challenges?; What are new risks that have emerged?

Breakout Session II – Auditorium

Making the Transition to Medicare

Presented by: Melissa Gattuso, President & CEO, Health Insurance Personalized, HIP Group, LLC

Melissa will identify the three main financial impacts to enrolling or not enrolling in Medicare, how to help your clients make those decisions and review some of the misconceptions people make about Medicare enrollment. Participants will gain a better understanding of how income can affect Medicare premiums and what can be done to mitigate those adjustments. COBRA/retiree coverage can affect the timing of Medicare enrollment, specifically referred to as the “COBRA trap”, we will explore how to avoid such an issue. We will also explore how a HDHP with an H.S.A. (pre-65) can greatly improve your financial well-being (post-65).

2:15 p.m. – Break with Sponsors

2:30-3:30 p.m. – Breakout Sessions (CFP® CE approved & PA Ins. CE pending)

Breakout Session I – Room 205-206

Real Estate Market Update

Presented by: Ben Stucker, CEO, Mortgage CS

Ben will share the latest data, trends and insights on the housing market, including changing regulations and impacts from emerging technologies. He'll dive into what it takes to get a home under contract in today's ultra-competitive market and share how advisors need to shift their mindset and client conversations now that the refi boom is over. Lastly, he'll share insights into where the market is heading and provide recommendations as to how advisors can stay one step ahead of the housing curve to deliver meaningful value and protect client interests over the coming years.

Breakout Session II – Auditorium

Crypto in a Financial Practice

Presented by: Adam Blumberg, CFP, Co-Founder, Interaxis

Crypto, Digital Assets, and Decentralized Finance don't seem to be going away, and will likely continue to be a growing asset class. In this session, Adam will walk you through some of the key aspects of making Crypto part of your financial services practice. Participants will get an understanding of the overall Crypto technology, and options for their clients. They will also have an overview of their path toward adding Crypto to their practice, including how it fits into a portfolio, the risks to their clients and to their practice, and some of the steps toward adding the new asset class.

3:30 p.m. – Break with Sponsors

3:45-4:45 p.m. – General Session (CFP® & PA Ins. CE pending approval)

General Session – Auditorium

Becoming a Better Biographer of Your Clients

Presented by: Mitch Anthony, Founder, Advisor Insights Inc.

Mitch explains how to strengthen relationships with your clients by increasing your ability to understand what is most important to them. Advisors are in the people business; Advisors need to know how people think and respond; Advisors need to understand how each client thinks about money. Learn how to bring meaning to your clients' lives and help them reach their goals, and how speaking their language will help you build stronger connections.

5:00 p.m. – Post-Symposium Happy Hour – Fox Barn at Twenty9, 16 Great Valley Parkway, Malvern, PA. Join us after the Symposium for cocktails and appetizers with your fellow FPA Philly members and friends. A perfect way to wrap up the day and miss the rush hour traffic!