



Financial Service Professionals

Syllabus for Continuing Education Program

Program Provider: Society of Financial Service Professionals Twin Cities
(MN Dept. of Commerce Provider #8724)
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Title: Investing in Volatile Times & How a Long-Term and Balanced Approach Can Work to Benefit your Client's Retirement

Speaker: Bob Thompson
Portfolio Manager/Vice President, Mairs & Power, Inc.
Co-Manager of the Mairs & Power Balanced Fund
Mairs & Power
332 Minnesota Street, W-1520, St. Paul, MN 55101
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Date: Thursday, November 7, 2019
Time: 11:00 AM Sign-in/Networking
11:15 AM Lunch Buffet open
11:30 AM Business meeting begins
12:00 PM – 1:00 PM Presentation

Location: **Town & Country Golf Cub**
300 N. Mississippi River Blvd.
St. Paul, MN 55104

Attendance Fees: FSP Members: \$40
Nonmembers first-time attendance: \$40
Nonmembers repeat attendance: \$50
Walk-ins: \$10 surcharge over registration fee
Refunds: No refunds for cancellations received after 11/1/19

CE Credits: This educational offering is APPROVED by the Minnesota Commissioner of Commerce as satisfying 1.0 hour of general classroom credit toward continuing insurance education requirements.
CFP: 1.0 hours APPROVED standard credits
CLE: 1.0 hours APPROVED standard credits

A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.

Who Should Attend: Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs

Educational Level: Intermediate

Course Description

Advisors will benefit by understanding the current United States and worldwide economic overview followed by details on investing in a volatile market and what its return means for investors. Also, this presentation will examine the importance of staying fully invested and not making big market bets and how discipline of long-term investing, along with a balanced approach (stocks and fixed income), adds stability and growth in an investors account. This presentation will help advisors with understanding, strategies, and talking points when investing for their clients.

Learning Objectives

1. Update on the United States and worldwide economies.
2. What the return of volatility means for investors.
3. How an investor may benefit from a portfolio holding both stocks and bonds.

Outline

- Update on the United States and worldwide economies - 20 min
- What the return of volatility means for investors - 20 min
- How an investor may benefit from a portfolio holding both stocks and bonds - 20 min

Total time: 60 Minutes

Instructional Materials for Students:

- PowerPoint in handout format

Examination & Answers: No exam