Agenda

Wednesday		
2:30 – 3:00pm		**Registration**
3:00 – 5:00pm	**William Schretter** **CE Credit | 2 hours** CFP approved ODI approved	**Ethics** A live ethics course to fulfill 2-hours of the continuing education requirement. The ethics requirement demonstrates to the public that certificants have agreed to provide personal financial planning in the client's best interest and to act in accordance with the highest ethical and professional standards for the practice of financial planning.
5:00 – 7:00pm		**Welcome Reception**

Thursday

7:00 – 8:00am		**Registration and Breakfast**
8:00 – 9:10am	**Michael Kitces** **CE Credit | 1 hour** CFP approved ODI approved	**Opening Remarks** **Advanced Roth Conversion Strategies** The natural appeal of a Roth-style retirement account is the potential for tax-free growth for life. However, the reality is that creating a Roth account has a "cost" – the upfront tax liability of contributing to (or converting into) the account. In this session, we explore techniques to maximize Roth contributions, including so-called "Backdoor Roth" IRAs and "Mega Backdoor Roth" 401(k) strategies, and leveraging the Roth recharacterization rules to optimally fill lower tax brackets, and be able to ensure that an investment in a Roth has a positive return before being required to commit to it!
9:20 – 10:15am	**Robert Keebler & Michael Kitces** **CE Credit | 1 hour** CFP approved ODI approved	**60 Minutes with Keebler and Kitces: Experts discuss the developments latest in Financial Planning** A town hall-style presentation featuring questions from audience members like you!
10:15 – 10:45am		**Break with Exhibitors**
10:45 – 11:55am	**Robert Keebler** **CE Credit | 1 hour** CFP approved ODI approved	**The SECURE Act Regulations: IRAs After Death** After much delay and anticipation, Treasury has finally promulgated the proposed regulations to implement the SECURE Act. It includes many refinements to the most-mortem distribution rules. Reviewing beneficiary designations and otherwise updating estate plans will be necessary.
11:55 – 1:15pm		**Lunch and Updates from FPA National**

1:15 – 2:10pm	**Breakout Session: The Benefits of Diversity** **Panel led by Jo Ann Quinif** Diversity, equity, and inclusion (DEI) have been topics of interest for many in the financial services industry and beyond in recent years. Why is diversity a priority for many firms today? What are the tangible benefits in decision-making and outcomes? Listen to experiences on this topic, discuss the benefits companies can achieve through diversity, outline challenges and next steps in building diverse teams, and highlight actions we all can take to encourage different ways of thinking.	**Breakout Session: Panel on Best Practices** **Statewide Panel led by Mark Beaver** Learn from three uniquely successful financial planning firms from across the state. This panel of firm leaders will discuss how each of them are creating and maintaining a culture within their organizations and how they are enhancing the client experience in the process.	**Breakout Session: The Economy, The Fed, and Real Estate Markets** **Randy Anderson** **CE Credit | 1 hour** CFP approved ODI approved This presentation will explore the current macroeconomic environment, Fed policies, and volatility in the financial markets. It will also provide an update on the real estate markets and where we see potential opportunities.

2:15 – 3:20pm	**Dr. David Kelly** **CE Credit | 1 hour** CFP approved ODI pending	**Guide to the Markets 2022 (4th Quarter)** The Guide to Markets provides an effective framework for understanding the global market and economy. This quarterly-updated presentation is aimed to educate financial professionals on developments within the markets and how it affects various investments and asset classes. It is designed to present statistics and data through charts and graphs, in a way that can help advisors address the markets and the economy based on logic rather than emotion while supporting their efforts to help clients make sound investment decisions.
3:20 – 3:45pm		**Break with Exhibitors**
3:45 – 4:55pm	**Heather Brilliant** **CE Credit | 1 hour** CFP pending ODI approved	**Leadership and Long-term Client Partnerships** The financial services industry plays a vital role in helping investors achieve their financial goals. But market distractions, industry changes and increasing complexity can often throw investors off course. Diamond Hill CEO Heather Brilliant, CFA, will explore the purpose of asset management and ways fiduciaries can connect that purpose to successful client outcomes through a focus on aligned interests, increased cognitive diversity and being a champion for the long run.
5:00pm	**Adjourn**	