2019 FPA Connecticut State Conference
April 24, 2019, AquaTurf Club, Plantsville, CT

Tentative 2019 Conference Timetable

7:00-8:00 REGISTRATION, BREAKFAST, VISIT SPONSORS (Kay's Pier North)

8:00-8:50 MORNING KEYNOTE PANEL: Big Firm/Small Firm – the Macro View 1 CFP
Charles de Vaulx, Portfolio Manager, IVA Funds and David L. Braun, Portfolio Manager, PIMCO

8:50-9:20 Coffee Break in the Resource Center (Kay's Pier South)

	Track I *Kays Pier North*	Track II *Glass Ballroom*	Track III *Wagon Room*
9:25-10:15	***8,000 Days of Retirement According to MIT AgeLab*** Ryan Sullivan The Hartford Funds **1 CFP**	***Hot Topics in Estate Planning*** Dan Daniels, Michael Clear and Erin Nicholls Wiggin & Dana **1 CFP, 1 Insurance**	***Planning for All Generations: What Advisors Need to Know about Student Loans*** Ross A. Riskin, American College of Financial Services **1 CFP**
10:15-10:45	COFFEE BREAK...Visit with Sponsors in the Resource Center (Kay's Pier South)		
10:50-11:40	***Growing Dividends for the Alpha Generation*** Anne Putnam FAM Funds **1 CFP**	***Understanding the Importance of Social Security Claiming*** Brian Doherty Filtech **1 CFP, 1 Insurance**	**Fixed Income Panel - Risks and Opportunities** James Meyers, PGIM Benjamin Lavine, 3D Asset Henry Peabody, Eaton Vance **1 CFP**

11:40-1:00 LUNCH SERVED (Kay's Pier North)

12:00-1:00 LUNCH KEYNOTE: Evolution of Vanguard Advisors Alpha - Ryan Donohue, Vanguard Financial Advisor Services™ 1 CFP

1:00 - 1:25 DESSERT IN THE RESOURCE CENTER (Kay's Pier South)

1:30-2:20 AFTERNOON KEYNOTE: Millennials to Boomers: Better HNW Planning By Generation - Mike Van Wyke, American Funds 1 CFP

2:20-2:45 COFFEE & SOFT DRINKS IN THE RESOURCE CENTER (Kay's Pier South)

	Track I	Track II	Track III
2:50-3:40	***Marriage and Money: Financial Planning for Spouses*** Ryan Bertrand Transamerica Capital **1 CFP**	***Utilizing Insurance in a Fee-only Practice*** David Lau DPL Financial Partners **1 CFP, 1 insurance**	***Healthcare in Retirement: The Need for Income Planning*** Michael Bitton Pacific Life **1 CFP, 1 Insurance**
3:50-4:40	***The Platinum Retirement Challenge and Perfect Storm*** Lili Vasileff Wealth Protection Management **1 CFP**	***Fiduciary Duties of Executors, Trustees and POAs*** Paul Czepiga CzepigaDalyPope **1 CFP, 1 Insurance**	***Beyond the Numbers, Retirement Income Planning Based on Demographics & Safe Withdrawal Rates*** Jeff Clark, Jackson National **1 CFP, 1 Insurance**

4:45-5:45 COCKTAIL HOUR (COMPLIMENTARY BEER, WINE, AND HORS D'OEUVRES), PRIZE DRAWINGS - You've got to be there, in person, for a chance to win great prizes from our sponsors, cash and free registration for 2020