2014 FPA Connecticut State Conference

April 23, 2014, AquaTurf Club, Plantsville, CT

Conference Timetable

7:15-8:00 AM REGISTRATION...THEN VISIT WITH EXHIBITORS IN THE RESOURCE CENTER (Kay's Pier South)

7:15-8:00 AM **FULL BUFFET BREAKFAST** (Kay's Pier North)

8:00-8:50 **MORNING KEYNOTE: It's Time to Draw the Line** *1 CFP CE*

Todd Fithian, The Legacy Companies

	TRACK I **(Chapel)** **Investments**	**TRACK II** **(Glass Ball Room)** **Insurance & Estate Planning**	**TRACK III** **(Wagon Room)** **Practice Management & Other Issues**
9-9:50 AM	*An Evolutionary Approach to Asset Allocation & Portfolio Construction* **Anthony Davidow** Charles Schwab 1 CFP CE	*The New Mindset for Estate Planning After ATRA 2012: Segmenting Our Thinking for Small, Medium and Large Clients* **Dan Daniels and Michael Clear** Wiggin and Dana 1 CFP , 1 insurance CE	*The Business Sale Process - What an Owner Should Know* **Jeff Swigget,** VR Business Sales and **Russ Lowry** Sagemark Consulting 1 CFP CE

9:50-10:20 AM COFFEE BREAK...VISIT WITH EXHIBITORS IN OUR RESOURCE CENTER (Kay's Pier South)

10:25-11:15 AM	*Outrunning the Bear - How you can outperform stocks and bonds with convertibles* **Greg Miller**, Wellesley Investment Advisors, Inc. 1 CFP CE	*Post-Health Care Reform: Financial Advisors Shaping Employer Benefits* **Eric Retsch** Code Six Four 1 CFP, 1 insurance CE	*Financial Adviser Who's Who – How "Brochure" Disclosures Can Change Investor Perception* **Julie Jason** Jackson, Grant Inv. Advisers, Inc. 1 CFP CE

11:15-11:45 AM VISIT WITH EXHIBITORS IN OUR RESOURCE CENTER (Kay's Pier South)

11:45-1:00 PM LUNCH SERVED (Kay's Pier North)

11:55-1:00 **LUNCHEON KEYNOTE: A Recipe for Growth...Plus a Pinch of Inflation** *1 CFP CE*

Thomas Spicer, Wellington Management

Presented by CHET Advisor, an Advisor Sold 529 Plan Managed by The Hartford

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

1:30-2:20 PM	*Revealing a Fund's Character: Making Sense of Active Share* **Kevin McDevitt** Morningstar 1 CFP CE	*Retirement Income Strategies: which strategies work, which don't and why?* **Manish Malhotra** Income Discovery 1 CFP, 1 insurance CE	*The 10 Most Important Lessons Learned in 46 years of Practice* **Vern Hayden** Hayden Wealth Management

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

2:50-3:40 PM	*Trend Aggregation-- Tactical Asset Allocation* **Matthew Tuttle** Tuttle Tactical Management 1 CFP CE	*Don't Trust A Trust That You Don't Know* **Paul Czepiga** CzepigaDalyPope 1 CFP CE,. 1 insurance CE	*The Hybrid Market is There. Are you?* **Tim Lockwood,** Lincoln Fin. Grp *(CFP and insurance credits can be accessed on line afterwards)*

3:45-4:35 **AFTERNOON KEYNOTE— The New Geography of Investing** *1 CFP CE*

David Polak, American Funds

4:35-5:35 PM **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 2015!
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