

Tuesday, April 27, 2021 (STAGE)

- 11:00-11:45 Hopin Tour for Attendees
1:00-1:45 Hopin Tour for Sponsors
4:00-4:45 Hopin Tour for Attendees
5:00-5:45 Hopin Tour for Sponsors

Wednesday, April 28, 2021

- 8:40-8:55 Welcome, Opening Remarks and Announcements
8:55-9:45 KEYNOTE: *What's Next for the Regulation of Advice?* STAGE
Blaine Aikin, Fiduciary Insights, sponsored by Charles Schwab 1 CFP, 1 Insurance

Session I

Session II

9:50-10:40 ***Planning for Business Owners***
Dan Daniels, Michael Clear
and Erin Nicholls
Wiggin & Dana
1 CFP, 1 Insurance

goRIA - A Virtual Roundtable Discussion
sponsored by Charles Schwab
Frank Pizzichillo, LPL; Ryan Donovan, Orion
Chris Winn, Advisor Assist; Jonathan Barth, DPL;
Kevin Duffy, Duffy & Staub; Moderator Chuck Failla

10:40-10:55 LIVE EXPO, VISIT OUR SPONSORS

11:00-11:50 KEYNOTE: *Creating a Better Future*
David M. Walker, Former U.S. Comptroller General STAGE 1 CFP

11:50-12:30 LIVE EXPO, VISIT OUR SPONSORS OR 12:15-12:45 CATCH UP WITH FPA CT LEADERS IN A SESSION

Thursday, April 29, 2021

- 11:20-11:30 Announcements
11:30-12:20 KEYNOTE: *Geopolitics in the Age of Disruption*
John Emerson, Capital Group Companies STAGE 1 CFP

12:20-12:50 LIVE EXPO, VISIT OUR SPONSORS

1:00-1:50 KEYNOTE: *After the Storm: Investing in 2021 & Beyond*
Dr. David Kelly, JP Morgan Asset Management STAGE 1 CFP

1:55-2:45 ***Client Conversations: I've Inherited an IRA; Now What?***
Michael Bitton
PAC Life
1 CFP, 1 Insurance

The Evolution of Success and Sustainability
Christine Sjölin
FP Transitions

2:45-3:00 LIVE EXPO, VISIT OUR SPONSORS

3:05-3:35 VERN HAYDEN LIFETIME ACHIEVEMENT AWARD / FIRESIDE CHAT WITH JIM PAVIA

3:40-4:30 ***Breaking Rules to Strengthen Financial Plans for Retirement***
Katherine Roy
JP Morgan Asset Management
1 CFP, 1 Insurance

Managing Taxable Investments
Maria Katsileros
Natixis
1 CFP

4:35-5:30 VIRTUAL WINE TASTING WITH NICK & RORY