2011 FPA Connecticut State Conference

April 27, 2011, AquaTurf Club, Plantsville, CT

Tentative Conference Timetable

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

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

8:00-8:50 AM **MORNING KEYNOTE: Doug Lennick, CFP** ***What you Know Can Hurt You*** *1 CFP Credit*

	TRACK I (Chapel) Investments	TRACK II (Glass Ball Room) Insurance & Estate Planning	TRACK III (Wagon Room) Tax Planning & Other Issues
9-9:50 AM	***The New Investment Adviser Registration Threshold: Navigating the Switch from SEC to State Regulation*** **Richard S. Cortese, Esq., NRS** 1 CFP Credit	***Estate Planning for "Hard" Assets*** **Dan Daniels and Dave Leibell** **Wiggin & Dana** 1 CFP & 1 CT Insurance CE	***Using the Web 2.0 and Social Media to Expand Communications and Build Relationships in a Smart, Compliant Manner*** **Marie Swift, Impact Comm.**
9:50-10:15 AM	COFFEE BREAK...VISIT WITH EXHIBITORS IN OUR RESOURCE CENTER (Kay's Pier South)		
10:20-11:10 AM	***Manage Volatility in Today's Market--Practical Options Strategies for FAs*** **Eric Cott, Options Ind. Council &** **Sean Heron, Rutgers Adj. Prof.** 1 CFP Credit	***What's Happening Now with Medicaid?*** **George Bickford** 1 CFP & 1 CT Insurance CE	***Debt Reduction for the Small Business Owner*** **Atty. Neil Crane** 1 CFP Credit

11:10-11:25 AM VISIT WITH EXHIBITORS IN OUR RESOURCE CENTER (Kay's Pier South)

11:30-1:00 PM LUNCH SERVED PROMPTLY AT 11:30 (Kay's Pier North)

11:55-1:00 PM **LUNCHEON KEYNOTE: DR. DAVID KELLY**— ***"From Recovery to Expansion: Guide to the Markets"*** *presented by JPMorgan* *1 CFP Credit*

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

1:30-2:20 PM	***Opportunities in Smallcap Investing*** **Tim Devlin** **Artio Global** 1 CFP Credit	***The Secondary Market for Life Insurance –The Next Generation*** **Drew Grifo** **Coventry** 1 CFP & 1 CT Insurance CE	***Key Investment Objective "maximum total return after taxes"*** **Dean A. Mioli** **SEI Advisor Network** 1 CFP Credit
2:20-2:45 PM	COFFEE & SOFT DRINKS IN THE RESOURCE CENTER (Kay's Pier South)		
2:50-3:40 PM	***529 Plans—A Smart Way to Save for College*** **Jeff Coghan** **The Hartford** 1 CFP Credit	***The Evolution of Long Term Care Planning*** **Lee Conti, CPS EA Insurance Services & Adam Chodos, JD, CPA** 1 CFP & 1 CT Insurance CE	***Advanced Estate Planning in 2011 - What You and Your Clients Need to Know*** **Doug Olin and Dan Johnson** **Cummings & Lockwood** 1 CFP Credit

3:45-4:35 PM **AFTERNOON KEYNOTE: *"Panel Discussion on the Effect of Financial Reform for Advisors"***
Moderated by Vern Hayden, panelists from FPA and NRS *1 CFP Credit*

4:35-5:30 PM **COCKTAIL HOUR (COMPLIMENTARY BEER, WINE, AND HORS D'OEUVRES) & PRIZE DRAWINGS**
You've got to *be there,* in person, to win ***cash prizes, complimentary conference registration***, plus *many* other great prizes from our sponsors and exhibitors. Cash bar after 5:30 p.m.