



# AGENDA - Monday, January 29

7:15 am - 7:45 am	Registration and Continental Breakfast		
7:45 am - 8:00 am	Welcome and Opening Remarks		
8:00 am - 8:50 am	<b>Opening General Session: The Crazy World of Health Care, Dr. Carolyn McClanahan, CFP®</b> Session has been accepted for 1-hour CFP®, FL Ins, CPE (self-reporting)		
9:00 am - 9:50 am	<b>General Session: Estate Planning: Considering Income Tax Consequences, Stacey Prince-Troutman</b> Session has been accepted for 1-hour CFP®, FL Ins, CPE (self-reporting)		
9:50 am - 10:10 am	Networking break with Resource Partners		
10:15 am - 11:05 am	<b>General Session - Protecting Your Clients, Protecting Yourself, Dr. Carolyn McClanahan, CFP®</b> Session has been accepted for 1-hour CFP®, FL Ins, CPE (self-reporting)		
11:10 am - 12:25 pm	<b>General Session: Economic Update: Reason to be Bullish, Craig Koproski</b> Session has been accepted for 1.5-hour CFP®, 1 hour FL Ins., CPE (self-reporting)		
12:30 pm - 1:15 pm	Lunch with Resource Partners		
1:15 pm - 2:05 pm	<b>General Session: Medicaid Planning and Unlicensed Practice of Law, Anthony Tuberville</b> Session has been accepted for 1-hour CFP®, FL Ins, CPE (self-reporting)		
2:10 pm - 3:00 pm	<b>General Session: IRA Rollovers: Opportunities in Changing Fiduciary Landscape, Shelby George, JD</b> Session has been accepted for 1-hour CFP®, FL Ins, CPE (self-reporting)		
3:05 pm - 3:55 pm	<b>General Session: Model Portfolios: Using Adaptable Portfolios to Streamline Business and Navigate Today's Market Environment, JD Gardner, CFA, CMT</b> Session has been accepted for 1-hour CFP®, FL Ins, CPE (self-reporting)		
3:55 pm - 4:15 pm	Networking Break with Resource Partners		
4:15 pm - 5:05 pm	<b>Adding Value Through Behavioral Coaching</b> Pending CE acceptance	<b>Non-Cash Assets as Charitable Contributions</b> Accepted for 1-hour CFP®, FL Ins, CPE	<b>CPS Long Term Care and Insurance: A-Z of Long Term Care: Session preapproved by FL Ins, Pending CFP</b>
	Room change		
5:10 pm - 6:00 pm	<b>Today's Affluent Investors: Insights and Opportunities</b> Accepted for 1-hour CFP, CPE	<b>Case Studies: Non-Cash Asset Contributions</b> Accepted for 1-hour CFP®, FL Ins,	<b>CPS Long Term Care and Insurance: A-Z of Long Term Care: Session preapproved by FL Ins, Pending CFP</b>
6:00 pm - 7:00 pm	Cocktail Reception with Resource Partners		



# AGENDA - Tuesday, January 30

7:15 am - 8:00 am	Registration and Continental Breakfast
8:00 am - 9:15 am	<p><b>General Session: Exploring Florida Prepaid College Savings Plans: A Deep Dive Discussion on Current Pricing and Flexibility, Sean Moore, CFP®</b>            Session has been accepted for 1.5-hour CFP®, 1 Hour FL Ins., CPE (self-reporting)</p>
9:20 am - 10:10 am	<p><b>General Session - The Growth of Smart Beta ETFs, Timothy Urbanowicz, CFA</b>            Pending CE acceptance</p>
10:10 am - 10:30am	Networking break with Resource Partners
10:30 am - 11:45 am	<p><b>General Session: What you Need to Know in 2018, Amy Moline</b>            Session has been accepted for 1.5-hour CFP®, 1-hour FL. Ins, CPE (self-reporting)</p>
11:45 am - 12:45 pm	Lunch with Resource Partners
12:50 pm - 1:40 pm	<p><b>General Session: Leveraging Your Client's Life Policy: Panel Discussion</b>            Session has been accepted for 1-hour CFP®, FL Ins., CPE</p>
1:45 pm - 2:35 pm	<p><b>General Session: Mortgage Planning for Retirement, Josh Velazquez</b>            Session has been accepted for 1-hour CFP®, FL Ins, CPE (self-reporting)</p>
2:40 pm - 3:20 pm	<p><b>General Session: Recent Trends In Domestic Asset Protection Planning: Eric Boughman, JD</b>            Pending CE acceptance CFP®, 1- hour FL Ins, CPE (self-reporting)</p>
	Break- Grab and go
3:30 pm - 5:20 pm	<p>Salon VI-V            CFP® Ethics Course: Part I and Part II            This session 2 hours            2 hours CE: CFP®, PACE, CPE            Session has been accepted for 2 hours CE CFP®</p>
CE Summary: Tuesday	Application has been submitted for continuing education credit
CE Summary: Total	<p>14.5 hours CE accepted by CFP Board, 14 hours FL Insurance, CPE (self reporting)            2 hours ETHICS CE accepted - total 16.5 CE hours for CFP accepted (with Ethics)</p> <p>2 Session Applications have been submitted for continuing education credit for CFP® will be updated when accepted</p>