Monday General Session Descriptions

CE

2022 Market and Economic Outlook: Paul Peterson

During this session Mr. Peterson will discuss where First Trusts Economists sees where the economy, stock market, interest rates, and inflation are headed over the next 12 months. Paul will then share where opportunities exist in the market place and how to take advantage of market dislocations.

Accepted for 1.5 hr CE, CFP and 1 hr. FL Ins, CPE

Purpose of Home Equity in Financial and Retirement Planning: Harlan Accola

There is 9.5 Trillion dollars currently saved in Home Equity in the demographic of Americans over 62. This has a dramatic effect on how baby boomers should invest, de-cumulate assets, plan for income taxes, and plan estate transfer and inheritances. Yet most financial advisors ignore one of the biggest asset classes in the nation. Home Equity can help with sequence of returns risk and market volatility and saving on Roth Conversions and other income tax savings. It can supplement long term care and medical costs. But perhaps the biggest factor is the legacy and inheritance left behind for the next generations. In an Investment News article, Jamie Hopkins has called NOT using home equity and mortgages in planning "the largest failure of the financial planning profession at this time"! To miss out on one of the largest opportunities for your clients, attend this session, and help your clients to a richer, better and safer retirement.

Accepted for 1.5 hr CE, CFP and 1 hr. FL Ins, CPE

2022 Tax Planning Strategies: John Nersesian

Tax planning continues to be a key way to add value to client relationships, and the changes in laws in recent years make it even more important for financial professionals to keep up with the best strategies. This session provides actionable advice around: Managing income in a tax efficient manner and the benefit of tax deductions; Unique strategies for business owners, corporate executives and retirees.

Accepted for 1 hr CE, CFP, FL Ins, CPE

Florida's New Directed Trust Act: Kelly Caldwell, C. Kelley Corbridge, JD

New Florida Law went into effect July 1st. It's going to expand your business relationships after years of advising these clients on their investment and financial goals. Kelly Caldwell of Caldwell Trust Company and Kelly Corbridge of Horlick & Corbridge will explain the important stages of becoming a Directed Trustee and how they can assist you and your clients easily with this transition.

Accepted for 1 hr CE, CFP, FL Ins, CPE

Monday Breakout Session Descriptions

Sellability Assessment: Janelle Pedulla, George Rosen

During this session, attendees will learn the various steps to create the most value in their practice succession plan (or their clients' plans), such as identifying a successor or buyer, evaluating core and non-core activities, preferred financial presentation, closing, and post-closing/transition period factors that can all impact the final, realized price of the transaction.

Accepted for 1 hr CE, CFP, FL Ins, CPE

Global Real Estate in the New Covid World: Hedging Against Inflation and Interet Rate Risk: Travis Conlan

During this session Travis will discuss global real estate and how it can play an important role for diversifying and balancing a portfolio during an inflationary period. The session will focus on the four major food groups of real estate, Office, Retail, Industrial, and Living. Travis explains how each of these sectors have been affected by covid and what we see moving forward with opportunities in each sector.

Accepted for 1 hr CE, CFP, FL Ins, CPE

A Professional Investor's Guide To Bitcoin, Blockchain, and Crypto: Alec Strain

2021 was a transformational year for bitcoin and crypto. Large institutions are investing and fortune 500 companies are embracing the space in significant ways. We have even seen a country make major investments in Bitcoin and recognize it as a legal tender. Financial professionals are asking whether current trends can continue and if now is the time to add crypto to client portfolios. In this presentation, Bitwise Business Development Officer Alec Strain, will explain the 3 major technological improvements that Bitcoin and blockchain represent, and what advisors should consider if adding crypto exposure to portfolios.

Accepted for 1 hr CE, CFP, FL Ins, CPE

Investing, Your Brain and Behavioral Finance: Steve Benjamin

When it comes to money, most people are not nearly as rational as they think they are. Money can make people funny and cause them to do things that make no logical sense, like buying a stock simply because its price is rising or selling it after the price has fallen significantly. In this presentation, you'll learn how the field of behavioral finance began, what's been learned so far, and how to help ourselves and our clients become better investors.

Accepted for 1 hr CE, CFP, FL Ins, CPE

Sustainable Growth: Managing Your Exceptions Not Just Your Models: JD Gardner

We've helped advisor teams do everything from build portfolios to prepare for meetings to transition firms and/or custodians. The common element is that the right partners can free an advisor to put their best energy into what they love most...helping clients.

In the current environment, the bulk of our requests revolve around a few key obstacles to building a structure and processes that both serve clients and create enterprise value. Consistently at the top:

• How can I best serve existing clients and still make time for new ones?
• How can I meet client return expectations when bonds yield basically nothing?
• How can I standardize my investment process but make my largest clients feel customized?

Accepted for 1 hr CE, CFP, FL Ins, CPE

Money Beliefs and Financial Behaviors: Steve Benjamin

In the same way a script guides an actor in a play, a money script influences how an individual makes financial decisions. Often formed early in life, these scripts lead to different beliefs about money and strongly influence saving, spending and borrowing habits. In this presentation, you'll learn about common money scripts, understand why they can be difficult to change and help clients examine their financial plan from a fresh perspective.

Accepted for 1 hr CE, CFP, FL Ins, CPE