



AGENDA - Monday, January 31

7:15am - 7:45 am	Registration and Continental Breakfast		
7:45 am - 8:00 am	Welcome and Opening Remarks		
8:00 am - 9:15 am	General Session - 2022 Market and Economic Update 1.5 hour CE, CFP, 1 hr. FL Ins, CPE		
9:20 am - 10:35 am	General Session - Purpose of Home Equity in Financial and Retirement Planning 1.5 hour CE, CFP, 1 hr. FL Ins, CPE		
10:35 am - 11:00 am	<i>Networking break with Resource Partners</i>		
11:00 am - 11:50 am	General Session - 2022 Tax Planning Strategies 1 hour CE, CFP, FL Ins, CPE		
11:55 pm - 12:45 pm	Lunch with Resource Partners		
12:50 pm - 1:40 pm	General Session: Florida's New Directed Trust Act 1 hour CE, CFP, FL Ins. CPE		
	Concurrent Sessions		
1:45 pm - 2:35 pm	Sellability Assessment 1 hour CE, CFP, FL Ins., CPE	Global Real Estate in the New Covid World: Hedging Against Inflation and Interest Rate Risk 1 hour CE, CFP, FL Ins., CPE	
2:35 pm - 2:55 pm	<i>Networking Break with Resource Partners</i>		
3:00 pm - 3:50 pm	<i>Investing, Your Brain and Behavioral Finance</i> 1 hour CE, CFP, FL. Ins., CPE	Sustainable Growth: Managing Your Exceptions Not Just Your Models 1 hour CE, CFP, FL Ins., CPE	A Professional Investor's Guide To Bitcoin, Blockchain, and Crypto 1 hour CE, CFP, FL Ins., CPE
	Room change		
3:55 pm - 4:45 pm	Money Beliefs and Financial Behaviors 1 hr. CFP, FL Ins, CPE	Session Repeats	Session Repeats
CE Summary: Day One	Accepted: 8 CFP CE, 7 hrs. FL Ins, CPE		



AGENDA - Tuesday, February 1

7:15 am - 8:00 am	Registration and Continental Breakfast	
8:00 am - 8:50 am	General Session - Evolution of Investing 1 hour CE, CFP, CPE, no FL. Ins.	
8:55 am - 10:10 am	General Session - COVID Clarity: Best College Planning Strategies for a Pandemic World 1.5 hour CE submitted CFP, 1 hr. FL Ins., CPE	
10:10 am - 10:35 am	Networking break with Resource Partners	
10:35 am - 11:50 am	General Session - 5 Key Real Estate Trends for 2022 1.5 hour CE submitted CFP, 1 hr. FL Ins., CPE	
11:55 pm - 12:45 pm 12:50pm - 2:05 pm	Lunch with Resource Partners Fireside Chat with American Century 1.5 hour CE, CFP, 1 hr. FL Ins., CPE	
2:10 pm - 3:00 pm	General Session - Estate Planning Update: Planning for Death and Taxes 1 hour CE, CFP, FL Ins. CPE	
3:05 pm - 3:55 pm	General Session: Cash Balance Plans 1 hour CE, CFP, FL Ins., CPE	
3:55 pm - 4:10 pm	Networking Break with Resource Partners	
	Concurrent session:	
4:15 pm - 5:05 pm	Sellability Assessment 1 hour CE, CFP, FL Ins., CPE	Global Real Estate in the New Covid World: Hedging Against Inflation and Interest Rate Risk 1 hour CE, CFP, FL Ins. CPE
CE Summary: Day 2	Accepted CE hours: 8.5 hours CFP, 6 hrs. FL Ins	
CE Summary: Total	Accepted CE hours: 16.5 CFP CE, plus 2 hours plus ethics (rescheduled), other disciplines 12	