



Speaker Bios Monday General Sessions



Paul Peterson is Vice President at First Trust, where he works with Financial Advisors to help them implement unit investment trusts, mutual funds, and ETFs into their practice.

He previously worked at Van Kampen and Invesco for 15 years selling mutual funds and UITs. Mr. Peterson has 16 years of experience in the financial services industry, and is a graduate of Loras College where he earned a degree in Mathematics and in Education.

Paul and his family currently reside in central Florida.

Session: Monday, Jan. 31, 8:00 AM - 2022 Market and Economic Outlook



Harlan Accola has been in the mortgage industry for over 20 years and has worked with all types of loans. His specialty and favorite has always been working amongst the 62 plus age group with over 1,000 Reverse Mortgages which has been the most rewarding part of his career. He is now the Reverse Mortgage Director for Fairway Independent Mortgage Corporation. His presentations will give you a very different perspective. He often asked his clients and professional partners, "If what you thought you knew about mortgages and financial planning was wrong, when would you want us to tell you?"

The goal of Harlan and Fairway is to change the way retirement is done for baby boomers in this country. There is a perfect storm and a retirement crisis that can be avoided if we properly manage the trillions of dollars in home equity.

Session: Monday, Jan. 31, 9:20 AM - Purpose of Home Equity in Financial and Retirement Planning



John Nersesian, CFP®, CIMA, CPWA, CIS is Head of Advisor Education at PIMCO, providing advanced wealth management and investment consulting education to financial professionals. John previously served as senior managing director of Wealth Management Services for Nuveen Investments from 2000 to 2018. He also served as first vice president at Merrill Lynch Private Client Group, where he was also a leader of advanced training for financial consultants.

Mr. Nersesian has 35 years of investment and financial service experience and is an industry thought leader and frequent media contributor. He served as a board member of the Investments and Wealth Institute (IWI, formerly IMCA) from 2006-2017, and as chairman for the 2014-2015 term, and is a faculty member for the IWI Certified Private Wealth Advisor (CPWA) and Certified Investment Management Analyst (CIMA) education programs held at Yale University and The University of Chicago. John holds a BS in Business and Economics from Lehigh University.

Session: Monday, Jan. 31, 11:00 am– 2022 Tax Planning Strategies



Kelly Caldwell is the CEO and President of Caldwell Trust Company. He began his professional career in 1988 after graduating with High Honors and a Bachelor of Electrical Engineering degree from the Georgia Institute of Technology. Caldwell started work at the family-owned registered investment advisory firm, which became Caldwell Trust Company in 1993. He succeeded his father as CEO in 2007.

Today, the company has offices in Venice and Sarasota and manages more than \$1.5 billion in assets. Caldwell's technology background has brought significant productivity improvements and profitable growth to the company. Under his leadership, total assets, total annual income, and stockholders' equity have increased more than 85%.

Caldwell is passionate about donating his time to the community, serving as a board member of the Argus Foundation, the Florida Bankers Association's Trust Executive Committee, the Sarasota Sheriff's Office Charitable Foundation, Inc., and The Suncoast Charities for Children. Lastly, he is alumni from the Leadership Florida Class of XXVIII.

Session: Monday, Jan 31, 12:50 PM – Florida's New Directed Trust Law



C. Kelley Corbridge is a partner in Horlick & Corbridge, P.A. Corbridge graduated from Wake Forest University in 1979 with a Bachelor of Arts degree in Economics and earned his Juris Doctor degree from the University of Florida College of Law in 1981.

Corbridge was admitted to the Florida Bar in 1981. He spent 21 years at First National Bank of Venice (subsequently SunTrust Bank), becoming Senior Vice President and Senior Trust Officer, managing trust administration, operations, and real estate for the Gulf Coast region. He maintains his CTFA designation from the American Bankers Association and is a graduate of the National Graduate Trust School. Corbridge left the bank for private law practice in 2002. He became Florida Bar Board Certified in Wills, Trusts and Estates in 2008. He has also received an AV Preeminent peer review rating from Martindale-Hubbell.

Corbridge has been an active member of the community and the profession as a member of the Florida Bar, Sarasota Bar Estate Planning Section, Venice-Englewood Bar Section, and is a past Chairman of various local charities.

Session: Monday, Jan 31, 12:50 PM – Florida's New Directed Trust Law