



Speaker Bios Tuesday General Sessions



Apollo D. Lupescu, PhD, Vice President, Dimensional Fund Advisors, is responsible for communicating Dimensional's academic foundations, investment beliefs and their applications for financial advisors and individual investors. From the highly technical presentations to investment professionals around the world, to the visual and storytelling talks at advisor client events, he frequently illustrates an investment process that presents an alternative to the conventional management and indexing approaches. Apollo joined Dimensional in February 2004 as a regional director and was part of the Investment Strategies Group. Prior to joining Dimensional, Apollo had his own consulting firm. His interests in finance and investments led him to teaching appointments at the University of California, Santa Barbara.

Apollo received his PhD in economics and finance from UCSB and holds a BA in economics from Michigan State University, where he competed in and coached water polo.

Session: Tuesday, Feb. 1, 8:00 AM - Evolution of Investing



Mari Adam CFP®, MBA, CRPC is a Client Advisor and Branch Manager, Mercer Advisors and has been a Certified Financial Planner™ professional since 1991. After college, she served as a US Foreign Service officer with the Department of State both overseas and in Washington, D.C. before going back to school to complete an MBA in International Finance. She switched careers in her early thirties, after earning the CFP® credential, and worked at several wealth management firms specializing in financial planning and portfolio management. Mari founded and ran her own comprehensive wealth management firm in Boca Raton, Florida, for 25 years, and recently sold it to become part of Mercer Advisors, a leading national investment advisor with 50 offices across the US and over \$27 billion under management.

She has been singled out to receive the Women's Choice Award® for Financial Advisors and Firms for five consecutive years, and specializes in helping women and other clients become financially independent. She is past President of the FPA South Florida Chapter.

She has two grown children and lives in Boca Raton FL.

Session: Tuesday, Feb. 1, 8:55 AM - COVID Clarity: Best College Planning Strategies for a Pandemic World



Amy Moline is the Founder and CEO of KeyBella Homes Group with Exp Realty. She and her team are ranked in the top 1% of the real estate industry and have a thorough understanding of helping others sell and buy real estate. While most agents in the industry average selling 5 homes per year, Amy and her team have sold over 1700 homes since 2005. KeyBella's focus has always been to exceed expectations for their clients.

Your clients deserve professionalism, honesty, and care. They deserve to understand the market and know what to expect when buying or selling real estate.

Session: Tuesday, Feb. 1, 10:35 AM - 5 Key Real Estate Trends for 2022



Brian Munn, CFP, AIF, CRPC, C(k)P is part of the Defined Contribution Investment Only sales team at American Century Investments dedicated to working with retirement advisors, platform wholesalers, and TPAs providing tools and products that enable them to increase business and market share. Brian joined American Century in April 2013 and covers the southeastern US. Brian previously worked at Natixis Global Asset Management where he was DCIO sales director for the Eastern Division. Prior to that roll he was the director of business development for the Principal Financial Group.

Brian is series 6,7, and 63 licensed. He is a graduate of the University of North Carolina at Chapel Hill.

Session: Tuesday, Feb 1, 12:50 PM- Fireside Chat with American Century Investments



Mike Galkoski is the National Sales Manager for American Century Investments dedicated to enhancing financial advisor relationships. Mike has worked in the financial services for over 20 years and leads the Wealth Management team responsible for the distribution of Mutual Funds, ETF's & SMA's. Prior to joining American Century Investments in 2008, Mike was a Regional Director with RS Funds covering all channels of NYC and Long Island. Prior to RS Funds, Mike held sales executive roles at Oppenheimer Funds and UBS Global Asset Management. Mike is currently a Doctoral candidate in Organizational Leadership at Columbia University in New York, New York. Prior to pursuing his doctorate, Mike earned the Master of Philosophy (MPHIL) degree in Organizational Dynamics from the University of Pennsylvania in Philadelphia, Pa. Mike holds an MBA from Rutgers University Business School in New Brunswick, NJ along with a B.S. in Finance from Fordham University in New York.

Mike has received specialized training in the Sequoia System for sales professionals and Fusion Presentation techniques and completed a Graduate Certificate in Organizational/Executive Coaching from the University of Pennsylvania. Mike has guest lectured on the topics of Organizational Leadership and Design at the University of Tennessee, Knoxville, Rutgers University, New Brunswick, NJ and N.C. State University.

Session: Tuesday, Feb 1, 12:50 PM - Fireside Chat with American Century Investments



Sean Walker is a vice president, exchange traded funds specialist for American Century Investments, a premier investment manager headquartered in Kansas City, Missouri. Sean is responsible for the coverage of ETFs for the Northeast and South divisions, and the education, implementation and sales of ETFs. Prior to joining American Century Investments in 2017, he was responsible for the private client group in Florida and the Caribbean for BlackRock iShares. Sean also held positions at Northern Trust FlexShares, Russell Investment Group and JP Morgan Institutional, representing both active and passive strategies throughout his career.

Sean holds a bachelor's degree in multi-national business finance from Florida State University, and MBA in management science from the University of Miami.

Session: Tuesday, Feb 1, 12:50 PM- Fireside Chat with American Century Investments



Stacey Prince-Troutman, Esq., an attorney at the law firm of Akerman, LLP., works primarily in probate, trusts and estates, and transfer tax controversy matters and has significant experience working with business owners and professional athletes. Mrs. Prince-Troutman focuses her practice on administering estates and trusts; planning for wealth transfer and transfer tax minimization; preparing gift and estate tax returns; drafting sophisticated estate plan documents; drafting documents related to the formation, management, and succession of closely held entities; asset protection planning; and forming and obtaining tax exempt-status for 501(c)(3) charitable organizations.

Ms. Prince-Troutman holds an AV Preeminent® rating with the Martindale Hubbell publication (only five percent of attorneys are awarded this rating), a rating denoting the highest accolade an attorney can receive for "legal ability" and "adherence to professional standards of conduct, ethics, reliability and diligence." She was selected as a "Florida Legal Elite" by Florida Trend magazine in 2016.

Session: Tuesday, Feb. 1, 2:10 PM – Estate Planning Update: Planning for Death and Taxes



James Esposito is a Qualified Plans Consultant at Manning & Napier. In this capacity, he assists employers with the technical design of existing and new qualified retirement plans to better address their goals and objectives. James also provides employers with plan document and governance reviews to ensure overall compliance with an increasingly complex body of rules and regulations. Prior to joining Manning & Napier in 2011, James spent 12 years as the Marketing Director for Security Administrators, Inc., an actuarial firm in Binghamton, New York. He has authored numerous articles and white papers concerning qualified plan design and maximizing benefits for owners of closely held businesses. James has been working in the qualified plans arena for over 18 years, performing defined benefit and defined contribution plan administration and consulting. James earned his BA in Mathematics from the State University of New York at Buffalo. He is a 15+ year member in good standing of the American Society of Pension Professionals and Actuaries (ASPPA), through which he holds the designation of Qualified Pension Administrator (QPA).

Session: Tuesday, Feb 1, 3:05 PM - Cash Balance Plans: Maximizing Benefits for the Business Owner