



## AGENDA - Tuesday, February 3

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| 7:15 am – 8:00 am                     | Registration and Continental Breakfast                                                                                                                                                                                                                                                      |                                                              |                 |
| 8:00 am – 8:50 am                     | General Session: <i>Indexing is a Series of Active Decisions</i> – Dimensional Fund Advisors -Sam Dinamarca                                                                                                                                                                                 |                                                              |                 |
| 8:55 am –9:45 am                      | General Session: <i>College Savings Strategies for Florida Clients</i> - Florida Prepaid- Paul Roldan                                                                                                                                                                                       |                                                              |                 |
| 9:45 am – 10:05 am                    | Networking break with Resource Partners                                                                                                                                                                                                                                                     |                                                              |                 |
| 10:10 am – 11:00 am                   | General Session: <i>Insights from the Federal Reserve</i> – Federal Reserve Bank of Atlanta – Michelle Denard                                                                                                                                                                               |                                                              |                 |
| 11:05 am – 11:55 am                   | General Session: <i>Helping Clients Stay Calm, Strategic, and Solvent During a Challenging Housing Market</i> - KeyBella Home Group - Amy Moline                                                                                                                                            |                                                              |                 |
| 12:00pm – 1:00 pm                     | Lunch with Resource Partners                                                                                                                                                                                                                                                                |                                                              |                 |
| 1:05 pm – 1:55 pm                     | General Session: <i>Capital Market Outlook</i> - Franklin Tempelton - Rick Poisnello                                                                                                                                                                                                        |                                                              |                 |
| 2:00 pm – 2:50 pm                     | Inland: Joe Kingsley - Tax Advantaged Real Estate Solutions and BBB Tax Bill's Impact on Commercial Real Estate                                                                                                                                                                             | Vanguard: Chris Tidmore<br>Ask Me Anything: Research Session | TBA             |
|                                       | R o o m   C h a n g e                                                                                                                                                                                                                                                                       |                                                              |                 |
| 2:55 pm – 3:45 pm                     | Session repeats                                                                                                                                                                                                                                                                             | Session repeats                                              | Session repeats |
|                                       | Break- Grab and Go                                                                                                                                                                                                                                                                          |                                                              |                 |
| 3:50 pm – 5:50 pm                     | Ethics -Columbia Threadneedle                                                                                                                                                                                                                                                               |                                                              |                 |
| Accepted CE Hours<br>Pending CE Hours | <p>Monday: 7 CFP CE Credits accepted; 1 pending CFP, other disciplines pending</p> <p>Tuesday: 7 CFP CE Credits accepted + 2 for Ethics, 2 IAR if attending Ethics. 7 other disciplines pending</p> <p>Total accepted CFP CE both days: 14 + 2 CFP Ethics, 13 other disciplines pending</p> |                                                              |                 |

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|              | <b><i>Tuesday, February 3 - General Sessions - Salon I-III</i></b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>8:00</b>  | <p><b><i>Indexing is a Series of Active Decisions– Dimensional Fund Advisors -Sam Dinamarca</i></b></p> <p>Indexing, or passive investing, is rising in popularity. A closer examination of the active decisions that index funds, index providers, and investors make while indexing raises questions about whether it is the most effective investment approach.</p> <p>1 hour of CFP® CE and FL Ins</p>                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>8:55</b>  | <p><b><i>College Savings Strategies for Florida Clients - Florida Prepaid- Paul Roldan, CFP®</i></b></p> <p>Florida families have unique opportunities when it comes to college savings. Join us for a practical workshop on integrating the many options - from Florida Prepaid's 529 investment plans and Bright Futures scholarships to financial aid - to create a personalized approach for clients that balances risk and reward. Whether your clients are high-net-worth or budget-conscious, you'll leave with actionable insights to help them achieve their education goals.</p> <p>1 hour of CFP® CE and FL Ins</p>                                                                                                                                                                             |
| <b>9:45</b>  | <b>Networking break with Resource Partners</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>10:10</b> | <p><b><i>Insights from the Federal Reserve – Federal Reserve Bank of Atlanta – Michelle Denard</i></b></p> <p>This session offers a unique opportunity to delve into the Atlanta Fed's active engagement in our communities via the Regional Economic Information Network. Michelle will provide an in-depth analysis of current economic trends, combining economic indicators with firsthand intelligence from our region's foremost business and community leaders. Here is your chance to hear directly from a key figure at the Federal Reserve Bank, gaining invaluable insights and a general economic outlook from the Fed's perspective. There will be a focus on the most current economic information on topics such as GDP, employment, and inflation.</p> <p>1 hour of CFP® CE and FL Ins</p> |
| <b>11:05</b> | <p><b><i>Helping Clients Stay Calm, Strategic, and Solvent During a Challenging Housing Market – KeyBella Home Group - Amy Moline</i></b></p> <p>Join Amy Moline as she addresses several challenges in today's Real Estate landscape. Amy will discuss these Core Themes:</p> <ul style="list-style-type: none"> <li>• 2025's challenges: high rates, increased supply, and affordability compression.</li> <li>• How planners can help clients pivot to evaluate their options</li> <li>• Emotional challenges for buyers, sellers, and real estate professionals</li> <li>• "We can't control the market, but we can control the strategy."</li> </ul> <p>1 hour of CFP® CE and FL Ins</p>                                                                                                              |
| <b>12:00</b> | <b>Lunch with Resource Partners</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>1:05</b>  | <p><b><i>Capital Market Outlook - Franklin Tempelton - Rick Poisnello</i></b></p> <p>Join Richard Polsinello as he leverages the knowledge of the firm's autonomous investment teams to communicate investment views and opinions. Mr. Pisanello will discuss the recent Global Investment Management survey with a focus on: The Global Economy, Equities, Fixed Income and Private Market Outlook. Attendees will walk away with a better understanding of where the capital markets could be positioned in 2026.</p> <p>1 hour of CFP® CE and FL Ins</p>                                                                                                                                                                                                                                                |

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| 2:00 | <p style="text-align: center;"><b>Breakout Sessions:</b></p> <p style="text-align: center;"><b>LAKE MARY</b></p> <p><b>Inland: Joe Kingsley - Tax Advantaged Real Estate Solutions and BBB Tax Bill's Impact on Commercial Real Estate</b></p> <p><b>Highlights Include:</b></p> <ul style="list-style-type: none"> <li>• <b>BBB Tax Bill Overview</b>- this sweeping tax and economic legislation extends and enhances key industry incentives, including Qualified Opportunity Zones (QOZs) and 1031 like-kind exchanges.</li> <li>• Overview of IRS Section 1031 Exchange</li> <li>• Guidelines and hypothetical example of 1031 Exchange</li> <li>• 1031 Exchange via a DST structure and benefits</li> <li>• Steps to a 721 Exchange via a DST</li> <li>• 1031/721 comparison</li> <li>• Overview of Qualified Opportunity Zones (QOZs)</li> <li>• Qualified Opportunity Fund (QOF) investments and their potential for favorable tax treatment</li> <li>• Real Estate Income Funds Featuring Highly Tax Efficient Income</li> </ul> <p style="text-align: center;">1 hour of CFP® CE and FL Ins</p> <p style="text-align: center;"><b>SEMINOLE</b></p> <p style="text-align: center;"><b>Vanguard: Chris Tidmore - Ask Me Anything: Research Session</b></p> <p>The presentation will look to cover the topics clients ask about most—such as opportunities in today's bond market, investing when stocks are near all-time highs, and how to think about market concentration. Using historical data and simple illustrations, it explains why diversification, discipline, and thoughtful asset allocation remain the foundations of successful investing. It also highlights how rising yields affect bond portfolios, why stocks can continue to perform even at record levels, and how advisors help clients stay focused on their long-term goals. Overall, the presentation is designed to give those who provide advice confidence, clarity, and a deeper understanding of the forces shaping their client's portfolios today.</p> <p style="text-align: center;">1 hour of CFP® CE and FL Ins</p> <p style="text-align: center;"><b>SALON IV</b><br/><b>TBA</b></p> |
|      | <b>Room Change</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 2:55 | <b>Lake Mary – Inland Session Repeats</b><br><b>Seminole – Vanguard Session Repeats</b><br><b>Salon IV - TBA</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|      | <b>Break- Grab and Go</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 3:50 | <p style="text-align: center;"><b>CFP® Ethics – Sponsored by Columbia Threadneedle</b></p> <p>With extensive credentials in financial planning, Edward Barrett will lead the essential CFP Ethics Course, providing guidance on upholding ethical standards in the field.</p> <p style="text-align: center;">Accepted for 2 hr. Ethics CFP and 2 hr. Ethics IAR</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |