The Profession of Financial Planning

Wednesday, September 27, 2017	
7:15 am	Registration Opens, Coffee and Breakfast noshing in the Community Lounge

Morning Sessions	
7:45 am	Welcome and Opening Remarks
7:55 am	"To Think, Feel, Act, and Learn...Like a CFP® Professional" Elissa Buie, CFP® 1.5 CFP® CE credit
9:15 am	Full Break in the Community Lounge
9:35 am	Evidence Based Financial Planning – How to Identify, Read, and Evaluate Research Dr. Dave Yeske, CFP® 1.5 CFP® CE credit
10:55 am	Mini Break
11:05 am	What We Know About Clients: Lessons from the Lab Dr. John Grable, CFP® 1.5 CFP® CE Credit
12:25 pm	Full Break in the Community Lounge, Lunch Buffet opens

Afternoon Sessions	
	Bring your lunch and your practice ideas into the main meeting room with you...
12:55 pm	Positioning the CFP® Professional as the Quarterback -How to Build Effective Collaborative Planning Teams and add Client Value. Introduction to a Collaborative Practice Business Model Fred Goldinov, JD, Vicki Harris, CPA, David Rosenthal, CFP®
2:20 pm	Full Break in the Community Lounge, Registration and Sign In for Ethics Course
2:50 pm	Policy Based Financial Planning as Decision Architecture Dr. Dave Yeske, CFP® 1 CFP® CE Credit **OR** A Pragmatic Walk Through the Ethical Looking Glass: Part 1 Melissa A. Kemp, CFP® 2 hours, CFP® Ethics Credit
3:40 pm	Mini Break: Passport Prizes Awarded
3:55 pm	Panel Discussion with our Presenters, Putting What We've Discovered to Use 1 CFP® CE Credit **OR** A Pragmatic Walk Through the Ethical Looking Glass: Part 2
4:45 – 5:00 pm	Closing Ceremonies