Wed - 9/27/17 - Symposium - 7:15A.M. to 5:00P.M.
Desert Willow Conference Center
4340 E Cotton Center Blvd, Phoenix, AZ 85040

The Profession of Financial Planning

ONE CONNECTION™ for CFP® Professionals

FPA FINANCIAL PLANNING ASSOCIATION OF GREATER PHOENIX

SERVE CLIENTS WELL. MAKE A GREAT LIVING. LIVE A GREAT LIFE...

The profession of financial planning is evolving- professional practice models are changing. Are you ready?

Trends and Forces

- CYBER SECURITY
- ROBO ADVISORS
- BOOMERS AND MILLENIALS
- DOL FIDUCIARY RULE AND REGULATIONS

6.5 HOURS OF PRE APPROVED CFP CE, WITH ADVANCED FULL DAY PRICING AT:

Bring Your Whole Team!

Member Price
$165

$205
Non Member Price

4 Pak Purchase
$500

Dr. David Yeske

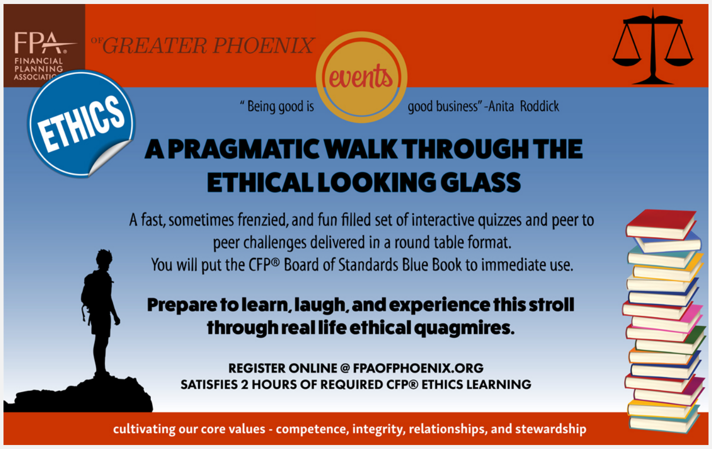
Elissa Buie

Dr. John Grable

Absorb knowledge and inspiration in the morning.

Join our luncheon Collaborative Practice Challenge.

Choose either Ethics or Implementation Conversations in the afternoon sessions.



For more information or to register visit
www.FPAofPhoenix.org or call 480-483-9035

SCHEDULE

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

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®
2:20pm	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® 1.5 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
3:55pm	Panel Discussion with our Presenters, Putting What We’ve Discovered to Use 1.5 CFP® CE credit OR A Pragmatic Walk Through the Ethical Looking Glass: Part 2
4:45 - 5:00 pm	Closing ceremonies