

**FPA OF CHARLOTTE**  
**2016 SYMPOSIUM & SPONSOR EXPO**  
 OCTOBER 6, 2016  
 WINTHROP UNIVERSITY  
 701 OAKLAND AVE. ROCK HILL, SC 29733

Time	Session	CFP	CPA	INS	CIMA	DESCRIPTION
6:45am-7:00am	Earlybird Check-In					
7:00am-8:40am	Session 1	2	2	2	2	Philip Gibson, Winthrop University: Trends in Retirement Research
7:45am-8:35am	Regular Check-In					Check-In and Continental Breakfast
8:45am-8:55am	Welcome					Welcome
8:55am-9:45am	Session 2	1	1	1	1	Jonathan Fanning: Who Are You Becoming?
9:45am-9:55am	Break					Break and Speaker Reset
9:55am-10:45am	Session 3	1	1		1	Paul Cieslik, American Funds: Elite Engagement
10:45am-10:55am	Break					Break and Speaker Reset
10:55am-11:45am	Session 4	1	1		1	David Kelly, JP Morgan: Economic Update
11:45am-11:55am	Break					Break and Speaker Reset
11:55am-12:45pm	Session 5a	1	1	1		Brooks Brown, FINRA: Trends in FINRA Enforcement & Arbitration
11:55am-12:45pm	Session 5b	1	1	1	1	Wendell Stallings, MetLife: Custom Tailored Insurance Strategies
12:45pm-1:30pm	Lunch					Lunch and Sponsor Expo
1:40pm-2:30pm	Session 6a	1	1		1	Lou Pantuosco, Winthrop University: Current Economic Update—From the Carolinas to the World
1:40pm-2:30pm	Session 6b	1	1	1	1	Tanya Oesterreich: Retirement Assets and Trust
2:30pm-2:40pm	Break					Break and Speaker Reset
2:40pm-3:30pm	Session 7a	1	1	1	1	Michael Graci, Blackrock: Medicare & Social Security—Optimizing Your Clients' Benefits
2:40pm-3:30pm	Session 7b	1	1	1		Janice Davies, Trust Management and Administration
3:30pm-3:40pm	Break					Break and Speaker Reset
3:40pm-4:30pm	Session 8a	1	1		1	Tom Schuette, Gurtin Municipal Bond Management: Unwrapping the Opaque Municipal Market—Hidden Opportunities in Plain Sight
3:40pm-4:30pm	Session 8b	1	1	1	1	Sam Donaldson, Georgia State University: Contemporary Tax Planning Paradigms
4:30pm-4:40pm	Break					Break and Speaker Reset
4:40pm-5:30pm	Session 9	1	1	1	1	Sam Donaldson, Georgia State University: Federal Tax Update
5:30pm-5:45pm	Closing					Rev 9.19.16