

FPA OF CHARLOTTE

2016 SYMPOSIUM & SPONSOR EXPO

OCTOBER 6, 2016

WINTHROP UNIVERSITY – DIGIGORIO CAMPUS CENTER
701 OAKLAND AVE. ROCK HILL, SC 29733

NOTE: BECAUSE OF ILLNESS AND WEATHER-RELATED TRAVEL CONCERNS, WE HAVE HAD TO SUBSTITUTE FIND REPLACEMENTS FOR TWO OF THE ORIGINAL SPEAKERS ON THE AGENDA. THESE SESSIONS ARE NOTED IN RED. CE CREDIT WILL STILL APPLY TO THESE SESSIONS.

Time	Session/Location	CFP	CPA	INS	CIMA	DESCRIPTION
6:45am-7:00am	Earlybird Check-In Richardson Lobby					
7:00am-8:40am	Session 1 Dina's Place	2	2	2	2	Philip Gibson, Winthrop University: Trends in Retirement Research
7:45am-8:35am	Regular Check-In Richardson Lobby					Check-In and Continental Breakfast
8:45am-8:55am	Welcome Richardson AB					Welcome
8:55am-9:45am	Session 2 Richardson AB	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 Richardson AB	1	1		1	Paul Cieslik, American Funds: Elite Engagement
10:45am-10:55am	Break					Break and Speaker Reset
10:55am-11:45am	Session 4 Richardson AB	1	1		1	David Kelly, JP Morgan: Economic Update
11:45am-11:55am	Break					Break and Speaker Reset
11:55am-12:45pm	Session 5a Richardson A	1	1	1		Jim Hickmon: Mitigating Fiduciary Litigation Risk & Legislative Update
11:55am-12:45pm	Session 5b Richardson B	1	1	1	1	Wendell Stallings, MetLife: Custom Tailored Insurance Strategies
12:45pm-1:30pm	Lunch McBryde Hall					Lunch and Sponsor Expo
1:40pm-2:30pm	Session 6a Richardson A	1	1		1	Lou Pantuosco, Winthrop University: Current Economic Update—From the Carolinas to the World
1:40pm-2:30pm	Session 6b Richardson B	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 Richardson A	1	1	1	1	Michael Graci, Blackrock: Medicare & Social Security—Optimizing Your Clients' Benefits
2:40pm-3:30pm	Session 7b Richardson B	1	1	1		Janice Davies, Trust Management and Administration
3:30pm-3:40pm	Break					Break and Speaker Reset
3:40pm-4:30pm	Session 8a Dina's Place	1	1		1	Todd Sisson, Wells Fargo Asset Management: Municipal Fixed Income
3:40pm-4:30pm	Session 8b Richardson B	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 Richardson AB	1	1	1	1	Sam Donaldson, Georgia State University: Federal Tax Update
5:30pm-5:45pm	Closing Richardson AB					Rev 10.5.16