

2010

FPA CHARLOTTE SYMPOSIUM AND SPONSOR EXPO

CHARLOTTE MARRIOTT EXECUTIVE PARK

SEPTEMBER 29-30

FEATURED SPEAKERS



Dr. Robert Froehlich, PLANCO/The Hartford
Froehlich serves as spokesperson on the markets, economy and investing to financial advisors and investors. In this role, he provides insight on the markets through investment commentary, public appearances, customer engagement and media visibility.



Gail Chrisley, JD, Nationwide
Chrisley will lead us through a the maze of what Washington, DC has wrought with her "Legislative Update"



James J. Dunn, Wake Forest University Endowment
Dunn will discuss "Asset Allocation in the New Normal"



Michael Kitces, MSFS, MTAX, CFP, CLU, CHFC, RHU,REBC, CASL, Pinnacle Advisory Group
Back by popular demand, Kitces will brave the topics of "To Roth or Not To Roth" as well as Safe Withdrawl Rates

...and many more!

VENUE

Charlotte Marriott Executive Park
5700 Westpark Drive
Charlotte, NC 29217
800.359.7961

A special room rate is being offered to FPA Charlotte Symposium attendees. For more information on this and other Symposium details, please refer to the website at www.fpaCharlotte.org.

SCHEDULE

Wednesday, September 29

12:00 - 1:00 pm

Registration

Finger Foods

Light Refreshments

Sponsor Expo

1:00 - 5:00 pm

Program

Thursday, September 30

7:30 - 8:00 am

Registration

Continental Breakfast

Sponsor Expo

8:00 am - 5:15 pm

Program

2010 SPONSORS/EXHIBITORS

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Jackson National - Prudential/Jennison Dryden

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Allianz Life/Allianz Global Investors - Carroll Financial Associates

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Horizon Investments - ING - INVESCO - JP Morgan Funds

Nationwide Financial - PLANCO/The Hartford

Realty Capital Securities - TD Ameritrade

The Carolinas Agency of Met Life

JADE SPONSORS

Calvert Investments - Columbia Management

Evermore Global Advisors - Franklin Templeton

Ivy Funds - John Hancock Annuities - Pacific Life

Wake Forest University Endowment

CE CREDITS*

**Credits applied for.*

11 Possible CFP® Hours

7 Possible NC-SC LAH INS Hours

11 Possible CPA Hours**

****CPAs are responsible for credit determination.**

Please bring your CFP and NPN numbers with you.

WWW.FPACHARLOTTE.ORG

AGENDA

WEDNESDAY, SEPTEMBER 29, 2010

12:00-1:00 pm			Registration/Sponsor Expo (Finger Foods/Light Refreshments)
1:00-1:10 pm			Welcome & Opening Remarks
1:10-2:25 pm	General Session	1CFP, 1 INS, 1 CPA	Gail Chrisley, JD , Nationwide Legislative & Tax Update
2:25-3:30 pm	Track 1A	1 CFP, 1 CPA	William J. Breen, Ph.D. , Horizon Investments Funding Retirement - A Novel Approach
2:25-3:30 pm	Track 1B	1CFP, 1 INS, 1 CPA	David R.P. Houston, JD, ING Basic and Creative Uses of Insurance in Estate Planning
3:30-4:00 pm			Break/Sponsor Expo
4:00-4:55pm	General Session	1.5 CFP, 1 CPA	Dr. Robert Froehlich , PLANCO/The Hartford Market Update

THURSDAY, SEPTEMBER 30, 2010

7:30-8:00 am			Registration/Continental Breakfast/Sponsor Expo
8:00-8:10 am			Welcome & Opening Remarks
8:10-9:25 am	General Session	1 CFP, 1 CPA	James J. Dunn , Wake Forest University Endowment Asset Allocation in the New Normal
9:25-10:30 am	General Session	1 CFP, 1 CPA	Andrew D. Goldberg , JP Morgan Funds Market Insights
10:30-10:55 am			Break/Sponsor Expo
10:55-11:50 am	Track 2A	1 CFP, 1 CPA	Ron King , Capital Investments Compliance Today - Social Media & Technology
10:55-11:50 am	Track 2B	1 CFP, 1 INS, 1 CPA	Holly W. Stubbing & Bart Landess , Foundation for the Carolinas The State of Philanthropy - Donor Advised Funds and Other Strategies
11:50 am-12:50 pm			Lunch/Sponsor Expo
12:50-1:50 pm	Track 3A	1 CFP, 1 CPA	Josef Schuster , Direxion Funds Tactical Asset Allocation Strategies
12:50-1:50 pm	Track 3B	1 CFP, 1 INS, 1 CPA	Dan Starishevsky , Jackson National Rollover: The Right Remedy for Retirement
1:50-2:50 pm	Track 4A	1 CFP, 1 INS, 1 CPA	Michael Kitces, MSFS, MTAX, CFP, CLU, CHFC, RHU, REBC, CASL Pinnacle Advisory Group Safe Withdrawal Rates
1:50-2:50 pm	Track 4B	1 CFP, 1 INS, 1 CPA	Michael Raymond , Prudential/Jennison Dryden Annuities and the Changing World of Living Benefits
2:50-3:15 pm			Break/Sponsor Expo
3:15-4:10 pm	Track 5A	1 CFP, 1 CPA	David Marcus , Evermore Global Advisors Global Equity Opportunities - A 20 Year Look
3:15-4:10 pm	Track 5B	1 CFP, 1 INS, 1 CPA	Bill Bell, JD, MBA , Pacific Life Business Succession and Retirement Planning for Business Owners
4:10-5:10 pm	General Session	1 CFP, 1 INS, 1 CPA	Michael Kitces, MSFS, MTAX, CFP, CLU, CHFC, RHU, REBC, CASL Pinnacle Advisory Group To Roth or Not to Roth
5:10-5:15 pm			Closing Remarks/Evaluations

AGENDA SUBJECT TO CHANGE WITHOUT NOTIFICATION

REGISTRATION FORM

Complete only if paying by check - to register and pay by credit card go to www.fpacharlotte.org

FPA Charlotte 2010 Annual Symposium & Sponsor Expo
September 29 & 30, 2010 at the Charlotte Marriott Executive Park

Are you MEMBER of the Financial Planning Association?
If not, join NOW by visiting www.fpanet.org.

Registration fees include refreshments, breaks and all program materials.
Continental breakfast and lunch will be served on Thursday, September 30.

	BOTH DAYS	WEDNESDAY ONLY	THURSDAY ONLY
EARLY REGISTRATION By August 15, 2010			
FPA Member	_____ \$175	_____ \$90	_____ \$120
Non-Member	_____ \$275	_____ \$140	_____ \$200
STANDARD REGISTRATION After August 15, 2010			
FPA Member	_____ \$225	_____ \$120	_____ \$150
Non-Member	_____ \$325	_____ \$175	_____ \$225

PLEASE CHOOSE YOUR TRACK SESSIONS — REFER TO AGENDA FOR DETAILS

Wednesday	1A		1B
Thursday	2A 3A 4A 5A		2B 3B 4B 5B

PLEASE COMPLETE ENTIRE FORM AND RETURN WITH PAYMENT

Name:	Designation (s) :	Email:
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Mail form (s) and payment to
FPAC Symposium Registration, 141-F Pelham Dr, Suite 145, Columbia, SC 29209

Cancellation Policy

Refunds less a \$20 processing fee will be made if notified of cancellation within 8 working days of the Symposium by emailing meetingplanner@fpacharlotte.org or by calling 803.929.6650. Substitutions accepted.

QUESTIONS? CALL 803.929.6650