



2024 FPA Houston Symposium | Thursday, September 12

7:15 AM	8:00 AM	REGISTRATION BREAKFAST MEET & GREET WITH SPONSORS	
8:00 AM	8:10 AM	Welcome & Opening Comments: FPA Houston President, Freddy Garza, CFP®, CPA	
8:10 AM	9:00 AM	Finding Your WHY Andrew Lamb, MBA Founder & Owner 4 Leaf Performance	
9:00 AM	9:10 AM	Networking Break Visit with Sponsors	
9:10 AM	10:00 AM	Direct Indexing Bill Bailey, JD, LLM Client Portfolio Manager Goldman Sachs	HSA Planning Ben Henry-Moreland, CFP, EA Senior Financial Planning Nerd Kitces
10:00 AM	10:15 AM	Networking Break Visit with Sponsors Morning Refreshments	
10:15 AM	11:05 AM	Alts As An Asset Class Ted Norcross, CIMA VP, Product Specialist CAIS	NexGen Advisors Are the Key to Your Financial Future and Success Alanah Philips, MBA Advisor Launch Lab
11:05 AM	11:15 AM	Networking Break Visit with Sponsors	
11:15 AM	12:05 PM	5 Pillars of Emotional Health Dr. Karthik Ramanan Emotional Health Mentor	
12:05 PM	1:00 PM	Networking Lunch with Sponsors in Grand Ballroom	
1:00 PM	1:50 PM	Advanced Education Planning: From 529 Plans to Student Loan Forgiveness Ross Riskin Chief Learning Officer Investments & Wealth Institute	
1:50 PM	2:00 PM	Networking Break Visit with Sponsors	
2:00 PM	2:50 PM	Digital Estate Planning: Afterline in the Cloud Jamie Hopkins, ESQ., LLM, MBA, CFP® CEO Bryn Mawr Trust	Tax Planning VS Tax Advicer Ben Henry-Moreland, CFP, EA Senior Financial Planning Nerd Kitces
2:50 PM	3:05 PM	Networking Break Visit with Sponsors Afternoon Refreshments	
3:05 PM	3:55 PM	Adaptive Based Retirement Income Planning Jamie Hopkins, ESQ., LLM, MBA, CFP® CEO Bryn Mawr Trust	
4:00 PM	5:00 PM	Post Symposium Reception CHEERS! Join your FPA colleagues, peers, partners and guest speakers for a special networking hour!	