



**FINANCIAL
PLANNING
ASSOCIATION**
CENTRAL
VIRGINIA

**2024 FPA Central Virginia Forum
June 5, 6 and 7, 2024**

Wednesday, June 5, 2024

Wed, June 5, 2024	General Session	Speaker	Topic
4:00 pm - 6:00 pm	Virtual -Zoom	Melissa Kemp, CFP®	CFP Board New Code of Ethics & Standards of Conduct

Thursday, June 6, 2024

Thurs, June 6, 2024	General Session	Speaker	Topic
7:30 am - 8:00 am	Registration/Breakfast		
8:00am - 8:05 am	Opening Remarks	Kristin Lindsay, FPACVA President	
8:05 am - 9:05 am	Session 1	Keynote - Roben Farzad, Host of Full Disclosure on NPR One	Institutional Memory
9:05 am - 10: 05 am	Session 2	Matt Wicker, Dimensional Fund Advisors	Passive is More Active Than You Think
10:05 am - 10:25 am	BREAK		
10:25 am - 11:25 am	Session 3	John D. Ellison, CFA, Richmond Quantitative Advisors, LLC	From Data to Decisions: Evidence- Based Insights into Navigating Economic Regimes
11:25 am - 12:30 pm	LUNCH	<i>Thank you to our Sponsor, Loretta Villacorta, New York Life</i>	
12:30 pm - 1:30 pm	Session 4	Bryan Gay, Boomer Insurance	Removing IRMAA- Strategies for Higher Income Earners
1:30 pm - 2:30 pm	Session 5	Karen Manna, Federated Hermes	At Any Rate...A Fixed Income Discussion
2:30 pm - 2:50 pm	BREAK		
2:50 pm - 3:50 pm	Session 6	Ryan Sullivan, CFP, CRPC, RCC, Hartford Funds	8000 Days- An Entire Phase of Your Life Waiting to Be Invented
3:50 pm - 4:50 pm	Session 7	Jesse Lineberry, CFP, Virginia Tech	Bridging the Gap Between Firm Leadership and Next Generation Planners
4:50 pm - 6:30 pm	Happy Hour	<i>Thank you to our Sponsor, Ameriprise Financial</i>	

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Friday, June 7, 2024

Friday, June 7, 2024	General Session	Speaker	
7:30 am- 8:00 am	Registration/Breakfast	<i>Thank you to our Sponsor, Dustin Schneider, FLX Networks</i>	
8:00 am - 8:05 am	Opening Remarks	Kristin Lindsay, FPACVA President	
8:05 am - 9:05 am	Session 8	Jeff Levine, Kitces	Everything You Ever Wanted to Know About Lifetime RMDs... And More
9:05 am - 10: 05 am	Session 9	Jeff Levine, Kitces	Advanced 529 Planning: 529-to-Roth, Dynasty 529, And Other HNW Opportunities
10:05 am - 10:25 am	BREAK		
10:25 am - 11:25 am	Session 10	Sarah Brownlow and M.R. Litman, Virginia Estate & Trust Law	Estate Planning and Estate Administration Case Studies: Best Practices To Avoid Unanticipated Outcomes
11:25 am - 12:30 pm	LUNCH		
12:30 pm - 1:30 pm	Session 11	Jimmy Mouser, CapCenter	Real Estate Finance: Data, Forecasts, and Advocacy
1:30 pm -2:30 pm	Session 12	Mary Morris, Virginia529	What You Need to Know About Virginia529 in 2024
2:30 pm -2:50 pm	Break		
2:50 pm - 3:50 pm	Session 13	John Mason, Mason and Associates	Enhance Client Financial Planning Meetings through a Strategic Planning Meeting
3:50 PM	Closing Remarks	Kristin Lindsay, FPACVA President	