FPA FINANCIAL PLANNING ASSOCIATION
HAMPTON ROADS

**The Westin Virginia Beach Town Center**
**4535 Commerce St., Virginia Beach, VA 23462**

**Attendee Feedback**

SCAN ME

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# Symposium Agenda

**Thursday, September 26, 2024**

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| 8:00 am - 8:30 am | Registration & Continental Breakfast |
| 8:30 am - 8:35 am | Welcome & Introduction<br>*Mark Tekamp, Symposium Chair* |
| 8:35 am – 9:35 am | Navigating 50 years in the Financial Services Industry- Lessons in Financial, Estate Planning and Investment Management<br>*Ralph Doudera, CEO, Spectrum Financial*<br>*CFP CE Course: 329307* |
| 9:35 am – 10:35 am | Enhancing Your Client Outcomes with Active AND Passive Investing<br>*Daniel J. Braz, Head of Intermediary ETF Strategist Team, State Street Global Advisors*<br>*CFP CE Course: 329306* |
| **10:35 am – 10:55 am** | **20 minute Break** |
| 11:00 am – 12:00 pm | Growth Advisors and Client Perspectives<br>*Cameron Logar, Regional Director, Practice Management, Dimensional Fund Advisors*<br>*CFP CE Course: 328770* |
| **12:00 pm – 1:00 pm** | **Lunch** |
| 1:00 pm – 2:00 pm | Removing IRMAA- Strategies for Higher Income Earners to Reduce Medicare Premiums<br>*Bryan Gay, Boomer Insurance Group*<br>*CFP CE Course: 328771; Virginia Insurance CE Course: 227458* |
| 2:00 pm – 3:00 pm | Estate Planning- The Top 10 Mistakes and How to Avoid Them<br>*Jennifer S. Rossettini, Attorney, CFP ®, Shareholder, Hook Law*<br>*CFP CE Course: 328772* |
| **3:00 pm – 3:30 pm** | **30 minute Happy Hour** |
| 3:30 pm – 4:30 pm | Strategies for Building Resilient Portfolios and Satisfying a Need for Income<br>*Kieran Kirwan, CAIA, Director, Investment Strategy, ProShares*<br>*CFP CE Course: 328774* |
| 4:30 pm | Closing Remarks<br>*Leland Gross, FPA Hampton Roads President Elect* |

***CE credit only for attendance of full programs as presented***
"FPA of Hampton Roads may change or substitute speakers or programs without notice"