2025 FPA DFW Conference | Wednesday, February 12

12:00 PM	2:00 PM	**CFP Code of Ethics & Standards of Conduct (GoToWebinar)** Charles R. Garcia, J.D., CFP® I PAX Financial Group
4:30 PM	6:30 PM	**FPA DFW Pre-Con Reception I Bar Louie Las Colinas**

2025 FPA DFW Conference | Thursday, February 13

7:00 AM	8:00 AM	DOORS OPEN I REGISTRATION I BREAKFAST I MEET & GREET WITH SPONSORS		
START	**END**			
8:00 AM	9:30 AM	**SECURE 2.0 Retirement Planning Opportunities and Challengles** Jeffrey Levine, CPA/PFS, CFP®, CWS®, BFA®, MSA I Lead Financial Planning Nerd, Kitces.com & Chief Planning Officer, Buckingham Wealth Partners 1.5 CE: CFP, CPA, CIMA, NAPFA		
9:30 AM	9:45 AM	NETWORKING BREAK WITH SPONSORS		
START	**END**	**MAVERICKS**	**STARS**	**RANGERS**
9:45 AM	10:35 AM	**Major Changes in the College Planning Process** **Cozy Wittman** Education & Partnerships I College Inside Track 1 CE: CFP, CPA, CIMA, NAPFA	**10 Year Rule** Jeffrey Levine, CPA/PFS, CFP®, CWS®, BFA®, MSA I Lead Financial Planning Nerd, Kitces.com & Chief Planning Officer, Buckingham Wealth Partners 1 CE: CFP, CPA, CIMA, NAPFA	**Your Aging Clients: Issues with Elder Fraud & Diminished Capacity** Amy Florian, Expert in Life Transition CEO I Corgenius 1 CE: CFP, CPA, CIMA, NAPFA
10:35 AM	10:50 AM	MORNING NETWORKING BREAK WITH SPONSORS		
10:50 AM	11:40 AM	**Adapting to Change: The Latest Developments in Long-Term Care Solutions** Sharon Luker Owner I Long Term Care Planning Consultants 1 CE: TDI, CFP, CPA, CIMA, NAPFA	**Engaging Your Clients Through Charitable Giving** Gary Garcia, CAP® VP of Philanthropic Partnerships I The Dallas Foundation 1 CE: CFP, CPA, CIMA, NAPFA	**Retain & Gain: An Evidence-based Client Communiation Schedule to Maximize Referrals and Retention** Evan Beach, CFP, EA, AWMA Founder & President I Exit 59 Advisory 1 CE: CFP, CPA, CIMA, NAPFA
11:40 AM	12:15 PM	NETWORKING LUNCH WITH PARTNERS I GRAND BALLROOM I DFW President's State of the Chapter Remarks		
12:15 PM	1:05 PM	Avantis Investors® By American Century Investments® **Lunch Keynote** 1 CE: CFP, CPA, CIMA, NAPFA		
1:05 PM	1:20 PM	NETWORKING BREAK WITH SPONSORS		
1:20 PM	2:10 PM	**Asset Protection** Jana L. Simons, J.D., LL.M., CFP® Meadows, Collier, Reed, Cousins, Crouch & Ungerman, LLP 1 CE: CFP, CPA, CIMA, NAPFA	**Reverse Mortgages** Jerry Auippa Reverse Mortgage Consultant I LongBridge Financial, LLC 1 CE: CFP, CPA, CIMA, NAPFA	**Protecting Your Client's Financial Plan During Their Working Years** Corey Anderson Owner I DI Geek 1 CE: CFP, CPA, CIMA, NAPFA
2:10 PM	2:25 PM	AFTERNOON REFRESHMENT BREAK WITH SPONSORS		
2:25 PM	3:15 PM	**Topic TBA** Craig Lemoine University of Illinois & Professor of Financial Planning 1 CE: CFP, CPA, CIMA, NAPFA	**Topic TBA** Erin W. Peirce Attorney & Partner I Leu, Peirce & Olson 1 CE: CFP, CPA, CIMA, NAPFA	**Retire Well: Retirement Beyond the Numberfs** Jessi Chadd, CFP®, CeFT Chief Wealth Officer I Aspyre Wealth Partners 1 CE: CFP, CPA, CIMA, NAPFA
3:15 PM	3:25 PM	MINI TRANSITION BREAK		
3:25 PM	3:35 PM	DOOR PRIZE DRAWINGS I ANNOUNCEMENTS I GRAND BALLROOM		
3:35 PM	5:00 PM	**The State of the Media: Finding Trusted Sources for Advisors and Clients** Mosheh Oinouou I Founder I Mo News 1.5 CE: CFP, CPA, CIMA, NAPFA		
5:00 PM	6:30 PM	**Post Conference Reception**		