




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® PAX Financial Group
4:30 PM	6:30 PM	FPA DFW Pre-Con Reception Bar Louie Las Colinas



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7:00 AM	8:00 AM	DOORS OPEN REGISTRATION BREAKFAST MEET & GREET WITH SPONSORS		
START	END	Lunch Keynote		
8:00 AM	9:30 AM	SECURE Act 2.0: Retirement Planning Opportunities and Challenges Jeffrey Levine, CPA/PFS, CFP®, CWS®, BFA®, MSA 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 to the College Planning Process Cozy Wittman Education & Partnerships College Inside Track 1 CE: CFP, CPA, CIMA, NAPFA	Planning Strategies to Mitigate the 10-Year Rule Jeffrey Levine, CPA/PFS, CFP®, CWS®, BFA®, MSA Lead Financial Planning Nerd, Kitces.com & Chief Planning Officer, Buckingham Wealth Partners 1 CE: CFP, CPA, CIMA, NAPFA	Your Aging Clients: What Advisors Need to Know About Dementia & Fraud Amy Florian, MA, CT, FT Expert in Life Transition CEO Corgenius, Inc. 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 R. Luker, CLTC Owner LTC Planning Consultants 1 CE: TDI, CFP, CPA, CIMA, NAPFA	Maximizing Client Engagement: Innovative Philanthropic Strategies Gary Garcia, CAP® & Kevin Betancourt, CAP® VP of Philanthropic Partnerships & Advisor Relationship Manager The Dallas Foundation 1 CE: CFP, CPA, CIMA, NAPFA	Retain & Gain: An Evidence-based Client Communication Schedule to Maximize Referrals and Retention Evan Beach, CFP®, EA, AWMA® Founder & President Exit 59 Advisory <i>Practice Management: Does not qualify for CE</i>
11:40 AM	12:15 PM	NETWORKING LUNCH WITH PARTNERS GRAND BALLROOM DFW President's State of the Chapter Remarks		
12:15 PM	1:05 PM	 By American Century Investments®	Keynote: Hal Hershfield, Professor of Marketing, Behavioral Decision Making, and Psychology at UCLA's Anderson School of Management 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	Is Today's Older Homeowner Sitting on a Gold Mine? Jerry Auippa Reverse Mortgage Consultant LongBridge Financial, LLC 1 CE: CFP, CPA, CIMA, NAPFA	Protecting Your Client's Financial Plan During Their Working Years Corey Anderson, DIA Owner DI Geek 1 CE: TDI, CFP, CPA, CIMA, NAPFA
2:10 PM	2:25 PM	AFTERNOON REFRESHMENT BREAK WITH SPONSORS		
2:25 PM	3:15 PM	The Intersection of Elder Care & Estate Planning Elizabeth Forspan Partner Forspan Klear, LLP 1 CE: TDI, CFP, CPA, CIMA, NAPFA	Topic TBA 1 CE: CFP, CPA, CIMA, NAPFA	Retire Well: 4 Ways to Help Clients Plan for Retirement Beyond the Numbers Jessi Chadd, CFP®, CeFT Chief Wealth Officer 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 ANNOUNCEMENTS GRAND BALLROOM		
3:35 PM	5:00 PM	The State of the Media: Finding Trusted Sources for Advisors and Clients Mosheh Oinouou Founder Mo News 1.5 CE: CFP, CPA, CIMA, NAPFA		
5:00 PM	6:30 PM	Post Conference Reception		