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**	**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 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 to the College Planning Process** Cozy Wittman Education & Partnerships I 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 I 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 I CEO I 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 I 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 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® **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	,		
1:20 PM	2:10 PM	**Covering Your Ass(ets): What You Need to Know About Asset Protection in Texas** 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, CRMP 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, DIA Owner I 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, Esq. Partner I Forspan Klear, LLP 1 CE: TDI, CFP, CPA, CIMA, NAPFA	**AI in Financial Planning** Matt Reiner, CFP®, CFA Managing Partner I Capital Investment Advisors & Wela Strategies 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 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 Oinounou I Founder & Editor in Chief I Mo News 1.5 CE: CFP, CPA, CIMA, NAPFA		
5:00 PM	6:30 PM	**Post Conference Reception**		