Retreat Agenda
2017 ANNUAL RETREAT

Acess the 2017 FPA Annual Retreat Live Agenda

VIEW AGENDA

APRIL 24 - 27
The 2017 Retreat will address some of the most pressing and influential issues in financial planning today.

The operating environment and age of a modern-day financial planner is changing rapidly. The primary aim of Retreat is to eliminate the notion that financial planning is an aged profession. In fact, at Retreat, we bridge the age gap while addressing critical multi-generational subjects.

This year, Retreat will also address pivotal matters such as elder care—a topic of concern for the next-generation financial planner—as well as emphasize new forms of communication between CFPs and the clients they serve.

Retreat is not a conference. It’s a gathering point where the best and brightest innovators in financial planning convene to tackle today’s business challenges. This deeply relational forum allows financial planners from all walks of life to deepen their passion for the art and science of financial planning.

In 2017, the esteemed Château Élan, north of Atlanta, will be the host site for Retreat. This one-of-a-kind destination is the perfect incubator of world-class, peer-to-peer learning. Here you will experience transformational networking and lifelong relationship building with the most leading of minds.

Join us as we usher in a new breed of talent and financial planner in 2017 and discover opportunities for building effective communication among financial planners of all ages and backgrounds.
DR. CARL A. HAMMERSCHLAG is a master storyteller and internationally recognized author, physician, speaker, healer and humanitarian clown. A Yale-trained psychiatrist; he has spent more than twenty years working with Native Americans. He is an expert on community-based health care, how to survive in rapidly changing cultures, and a leading authority in the practical applications of Psychoneuroimmunology (mind-body-spirit medicine). Dr. Hammerschlag’s life work has been chronicled in four critically acclaimed books: The Dancing Healers, The Theft of the Spirit, Healing Ceremonies, Kindling Spirit: Healing From Within, and two children’s books. He is a recipient of the National Caring Award. Selected by the Caring Institute of Washington D.C. from more than a quarter million nominations, the award honors “the ten most caring adults in America.”

CARL A. HAMMERSCHLAG, MD

KERRI KASEM is a multimedia personality, producer, and writer who has anchored numerous music, talk and entertainment programs for both radio and television. Kerri is the daughter of the late radio host and icon Casey Kasem. Kasem was co-host of the internationally syndicated Sixx Sense with Nikki Sixx for four years, but left the show to fight for her father, and to lobby for the “Visitation Bill” AB2034 in California. She founded the Kasem Cares Foundation to establish and fight for the rights to have visitation and reasonable access to an ailing parent, especially when under the care and control of an uncooperative spouse or sibling. Kasem currently co-hosts the syndicated The New American Funding Radio as well as co-hosting the real-estate program The Mortgage Radio Show.

KERRI KASEM

CAM MARSTON is the leading expert on the impact of generational change and its impact on the marketplace. As an author, columnist, blogger and lecturer, he imparts a clear understanding of how generational demographics are changing the landscape of business. Marston’s books, articles and blog describe and analyze the major generations of our time: Matures (born before 1946), Baby Boomers, (born 1946-64), Generation X (born 1965-79) and Millennials (born 1980-2000). He explains how their generational characteristics and differences affect every aspect of business, including recruiting and retention; management and motivation; and sales and marketing. The Gen-Savvy Financial Advisor (2012) is a must-read in the financial services industry.

CAM MARSTON

DENNIS STEARNS, CFP®, ChFC is the founder of Stearns Financial Group and a nationally recognized expert on Financial Planning and the effect of Super Trends on clients’ investments, careers and the economy. He is the author of several books and is regularly quoted in major publications including the Wall Street Journal, NY Times, Kiplinger Finance, Financial Planning magazine and the Journal of Financial Planning. Stearns has advanced training in investment planning, financial planning, business planning and estate planning. He is considered an expert on “Super Trends,” or how the convergence of globalization, technology accelerators, the global age wave and other forces will dramatically impact our investments, our financial planning, our careers and our lives in the future.

DENNIS STEARNS, CFP®, ChFC

Featured Speakers

CARL A. HAMMERSCHLAG, MD

KERRI KASEM

CAM MARSTON

DENNIS STEARNS, CFP®, ChFC

KERRI KASEM

DENNIS STEARNS, CFP®, ChFC
Monday, April 24

3:00pm - 3:45pm  New Attendee Orientation
4:00pm - 4:30pm  Transition into Retreat
4:30pm - 5:00pm  Break
5:00pm - 6:15pm  Opening General Session
                  The Way It Was Is Not The Way It Is, and Your Experience Could Be Your Worst Enemy!
                  Dr. Carl Hammerschlag
6:15pm - 6:30pm  Break
6:30pm - 7:15pm  Welcome Reception
7:15pm - 9:00pm  Dinner
9:00pm          Afterglow

Tuesday, April 25

6:45am - 7:30am  Yoga
7:00am - 8:00am  Breakfast
                  Sponsored Session
8:00am - 8:15am  Breakfast
                  Sponsored Session
                  City National Rochdale
                  Investment Management
8:15am - 9:15am  Breakout Sessions
                  A Financial Life Planning Generational Workshop:
                  Focusing on Planner Way-of-Being and Spiritual Intelligence (SQ)
                  Stephen C. Brody, CFP®
                  Technology Transitions Peer-to-Peer session
                  Climbing Your Way to the Top: Maximizing Your Human Capital
                  for Success
                  Caleb Brown, MBA, CFP®
9:15am - 9:35am  Break
9:35am - 10:45am General Session
                  Elder Abuse Prevention
                  Kerri Kasem
                  Evolving Our Relationship with Money
                  Dick Wagner, J.D., CFP®
10:45am - 11:15am Break
11:15am - 12:15pm Cultivating Trust, Power and Possibilities
                  Don St. Clair, CFP®, Alf®
                  Transitioning to New Business Models
                  Panel: Eric Roberge, CFP®; Rianka Dorsainvil, CFP®
12:15pm - 1:30pm  Lunch
                  Hotel Buffet
                  Five Things Every Financial Advisor Needs to Know About Higher
                  Education Financing
                  Heather Jarvis
                  Financial and Emotional Issues Regarding Elder Care
                  Carolyn McClanahan, M.D., CFP®
1:30pm - 2:30pm  Building an Efficient Practice So You Can Spend Time Away from the Office
                  Micah Shilanski, CFP®, RFC®
                  Resources for Responding to the DOL Rule
                  Micah Hauptman
2:30pm - 3:45pm  Under the Trees
**Tuesday, April 25**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Speaker(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:45pm - 4:45pm</td>
<td>Converging Trends that Are Rocking Our World</td>
<td>Dennis Stearns, CFP®, ChFC</td>
</tr>
<tr>
<td>4:45pm - 5:05pm</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>5:05pm - 6:05pm</td>
<td>Breakout Sessions TBD</td>
<td></td>
</tr>
<tr>
<td>6:05pm - 7:30pm</td>
<td>Reception, Buffet Dinner</td>
<td></td>
</tr>
<tr>
<td>7:30pm - 11:00pm</td>
<td>Goofy Golf / Games</td>
<td></td>
</tr>
</tbody>
</table>

**Wednesday, April 26**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Speaker(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>6:45am - 7:30am</td>
<td>Yoga</td>
<td></td>
</tr>
<tr>
<td>7:00am - 8:00am</td>
<td>Breakfast, Sponsored Session</td>
<td></td>
</tr>
<tr>
<td>8:00am - 8:15am</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>8:15am - 9:30am</td>
<td>General Session, The Gen Savvy Financial Advisor Cam Marston</td>
<td></td>
</tr>
<tr>
<td>9:30am - 9:45am</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>9:45am - 10:45am</td>
<td>Breakout Sessions, The Gen Savvy Financial Advisor Cam Marston</td>
<td></td>
</tr>
<tr>
<td>9:45am - 10:45am</td>
<td>7 Steps to Protect Yourself, Your Practice and Your Clients Who Have Diminished Mental Capacity</td>
<td>Bob Mauterstock, CFP®, CLU, ChFC</td>
</tr>
<tr>
<td>11:15am - 12:15pm</td>
<td>Under the Trees</td>
<td></td>
</tr>
<tr>
<td>11:15am - 12:15pm</td>
<td>Breakout Sessions, The Business of Transitions Courtney Pullen, M.A.</td>
<td></td>
</tr>
<tr>
<td>12:15pm - 1:30pm</td>
<td>Lunch, Hotel Buffet</td>
<td></td>
</tr>
</tbody>
</table>
**Wednesday, April 26**

1:30pm - 2:30pm  
**Breakout Sessions**  
- **Coaching Panel**  
  Courtney Pullen, M.A.; Tracy Beckes, M.B.A.
- **Passing The Torch, Creating an Intergenerational Plan for Your Clients**  
  Bob Mauterstock, CFP®, CLU, ChFC
- **Managing Student Loans in a Changing Landscape**  
  Adam Minsky, Esq.

2:30pm - 3:45pm  
- **Wealth Planning for Cross-Border Families**  
  Andrew Fisher, CFA, CPA
- **The Millenial Mindset: Attracting the Next Generation**  
  Dr. Nathan Harness
- **How to Use Social Media to Generate New Clients - Part 1**  
  Lauren Greutman

3:45pm - 4:00pm  
**Break**

4:00pm - 5:30pm  
**World Café: Financial Planning Practice Models for Now and the Future**

5:35pm - 6:35pm  
**PAC Reception**

6:35pm - 8:00pm  
**Dinner**

8:00pm - 11:00pm  
**Retreat Party**

**Thursday, April 27**

6:45pm - 7:30pm  
**Yoga**

7:15am - 8:15am  
**Breakfast**  
Sponsored Sessions

8:15am - 8:30am  
**Break**

8:30am - 9:40am  
**Managing Your Energy for WOW - Creating the Truly Remarkable Client Experience**  
Sponsored Keynote  
Janus Funds, John Evans

9:40am - 9:50am  
**Break**

9:50am - 11:10am  
**Elder Care Panel**  
Jim McCabe, CFP®; Carolyn McClanahan, M.D., CFP®; Susan Bradley, CFP®; Bob Mauterstock, CFP®, CLU, ChFC  
Moderated by Bob Powell

11:10am - 11:20am  
**Break**

11:20am - 12:00pm  
**Closing Circle**  
Reflection and Close

**Acess the 2017 FPA Annual Retreat Live Agenda**

**VIEW AGENDA**