

# 2005 FPA Connecticut State Conference

April 27, 2005, AquaTurf Club, Plantsville, CT

## Conference Timetable

7:15-8:00 AM REGISTRATION...THEN VISIT WITH EXHIBITORS IN THE RESOURCE CENTER

7:15-8:15 AM **FULL BUFFET BREAKFAST** — Kay's Pier North

8:00-8:50 AM **KEYNOTE: "The 4-Step Financial Planning Initial Interview Process"**  
**Max Bolka, The Bolka Company** *1 CFP Credit*

	<b>TRACK I (Glass Ballroom) Planning for the Middle Market</b>	<b>TRACK II (Kay's Pier North) Family Wealth</b>	<b>TRACK III (Wagon Room) Planning for the Corp. Executive</b>
9:50-10:00 AM	<b>"Unraveling The Mysteries of the College Financial Aid Process"</b> James Maroney, First Choice College Placement <i>1 CFP Credit</i>	<b>"Reverse Mortgages—A Financial and Estate Planning Tool"</b> Stephen Lamoreaux, Amston Mortgage Co. <i>1 CFP Credit</i>	<b>"Split Dollar and Deferred Compensation"</b> Richard Landsberg, JD, LLM, RFC Nationwide Financial <i>1 CFP Credit, 1 Insurance Credit</i>
9:50-10:15 AM	COFFEE BREAK...VISIT WITH EXHIBITORS IN OUR RESOURCE CENTER		
10:20-11:10 AM	<b>"Maximizing Value for Your Divorcing Clients"</b> Lili Vasileff, MIA, CFP, CDFA <i>1 CFP Credit</i>	<b>"The Forgotten Asset - Why is the Life Settlement Business Growing?"</b> John Fitzgerald, The Life Settlement Alliance <i>1 CFP Credit</i>	<b>"Modern Asset Protection Strategies"</b> Dan Daniels & David Leibell, Cummings and Lockwood <i>1 CFP Credit, 1 Insurance Credit</i>
11:10-11:25 AM	VISIT WITH EXHIBITORS IN OUR RESOURCE CENTER		
11:30-1:00 PM	LUNCH SERVED PROMPTLY AT 11:30 (Kay's Pier North)		
11:55-1:00 PM	<b>LUNCHEON KEYNOTE: "Financial Planning for Middle America"</b> <b>Sheryl Garrett, CFP, Garrett Financial Planning</b> <i>1 CFP Credit</i>		
1:00 - 1:25 PM	DESSERT IN THE RESOURCE CENTER		
1:30-2:20 PM	<b>"Myths and Realty of Long Term Care Financing I"</b> Patricia Vega, CFP, CSA, CLTC Golden Rule Financial Services <i>1 CFP Credit, 1 Insurance Credit</i>	<b>"Effective Life Planning Strategies"</b> George Taylor, CFP, ChFC, CLU, Temenos, Inc. <i>1 CFP Credit</i>	<b>"Pension, Endowments &amp; Foundations"</b> Dr. Susan M. Mangiero, AVA, CFA, FRM <i>1 CFP Credit</i>
2:20-2:45 PM	COFFEE, SOFT DRINKS AND DESSERT IN THE RESOURCE CENTER		
2:50-3:40 PM	<b>"Health Savings Accounts"</b> Dr. Bill West, First HSA <i>Sponsored by</i> The Health Consultants Group <i>1 CFP Credit, 1 Insurance Credit</i>	<b>"Differentiate Your Practice Through Total Balance Sheet Management"</b> Ray Cioci, Thornburg Mortgage <i>1 CFP Credit</i>	<b>"Presenting Client Investment Strategies—from IPS to Tailored Portfolios"</b> Vern C. Hayden, CFP, Hayden Financial Group <i>1 CFP Credit</i>
3:45-4:35 PM	CONCLUDING GENERAL SESSION ~ Kay's Pier North <b>KEYNOTE: "How to Gain Trust of America's Affluent,"</b> <b>Scott Fithian, CLU, ChFC, The Legacy Group</b> <i>1 CFP Credit</i>		
4:35-5:30 PM Resource Center	<b>COCKTAIL HOUR (COMPLIMENTARY BEER, WINE, AND HORS D'OEUVRES) &amp; PRIZE DRAWINGS</b> You've got to <i>be there</i> , in person, to win <i>cash prizes, complimentary conference registration</i> , plus <i>many</i> other great prizes from our sponsors and exhibitors. Cash bar after 5:30 p.m.		