The Georgia Society *of* CPAs

Personal Financial Planning Conference

October 25, 2017

Event Code: 13050, LS13050

GSCPA Learning Center

Atlanta, Georgia

The Georgia Society *of* CPAs

The Georgia Society *of* CPAs
Six Concourse Parkway
Suite 800
Atlanta, GA 30328

Personal Financial Planning Conference

Nonprofit Organization
U.S. Postage
PAID
Atlanta, Georgia
Permit No. 1366

Personal Financial Planning Conference

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GSCPA Learning Center | Atlanta, Georgia

CPE Credit: 8 hours | CFP® Credit: 8 hours (applied for)

Live Stream Attendance: To register, visit www.gscpa.org or call 404-504-2985 or 800-330-8889, Opt. 3.

Your clients look to you for guidance and sound advice in their journey to financial well-being. This timely conference will provide you with the tools you need to navigate current local and national changes.

NEW for 2017 - Two tracks for study for optimal learning and guidance to best fit your individual, professional needs.

Who Should Attend CPAs, CFOs, investment advisors, controllers, and finance managers.

Conference Task Force

Cromwell Baun, CFA, CIMA®, CFP®
UBS Wealth Management, Atlanta, Georgia

Bryce Nations, CPA, CFP®
Frazier & Deeter, Atlanta, Georgia

Doug Neal, CPA
Windham Brannon, Atlanta, Georgia

Susan Tillery, CPA/PFS, CFP®
Paraklete Financial, Kennesaw, Georgia

Jay Loyd, CPA, CFP®
SignatureFD, Atlanta, Georgia

Steve Rochen, CPA
Beecher Carlson, Atlanta, Georgia

Sam Schuessler, CPA
Schuessler & Company, Auburn, Alabama

Facility

The Georgia Society of CPAs Learning Center
Six Concourse Parkway, Suite 800, Atlanta, Georgia 30328
404-231-8676 | 800-330-8889
Directions:
www.gscpa.org/content/ContinuingEducation/travelinfo.aspx

Hotel

The Westin - Perimeter North
Seven Concourse Parkway NW, Atlanta, Georgia 30328
770-280-9860 | http://bit.ly/WestinAtlantaGSCPA

Enhance Your Experience with this Additional Opportunity:

PERSONAL FINANCIAL PLANNING BOOT CAMP: SYSTEMATIC TOPICAL PFP OVERVIEW AND PFS EXAM REVIEW

Expand your knowledge from the Personal Financial Planning Conference at the AICPA In-Person Personal Financial Planning Boot Camp.

November 1-3, 2017
Event Code: PFPBOOT
GSCPA Learning Center, Atlanta
Instructor: Susan Tillery, CPA, PFS, CFP®

Receive an informative and highly engaging review of all personal financial planning (PFP) topics including tax, estate, retirement, investment, insurance/risk-management planning and the financial planning process, including the Statement on Standards in PFP Services. By illustrating concepts with real-life scenarios and practical guidance, the instructor will both improve your retention for the Personal Financial Specialist (PFS) credential exam and enable you to increase productivity and income back in your office.

To register, visit www.gscpa.org or call 404-504-2985 or 800-330-8889, Opt. 3.

Program Schedule

7 - 8 a.m.
Registration and Continental Breakfast

8 - 8:05 a.m.
Welcome and Announcements

8:05 - 8:55 a.m.
A - The Future of Services for Individuals
Dan Snyder CPA/PFS, ChFC, AICPA
Susan Tillery CPA/PFS, CFP, PARAKLETE® FINANCIAL, INC., Kennesaw, Ga.
Explore how services to individuals in tax compliance and tax planning, as well as personal financial planning, are expected to evolve in the near future. Understand how key trends in demographics, technology, regulations, evolving consumer needs, and offerings by other service providers will be crucial for CPAs and CPA firm decision makers. Discuss how to position your firm for success.

8:55 - 9:05 a.m.
Break

9:05 - 10:20 a.m.
B - 2017 Estate Planning Update
O. Lee Wiseley Jr., J.D., LL.M., Columbus, Ga.
Review the current estate planning environment, with particular emphasis on existing tax exclusion structure, tax rates, and how to utilize the exclusions to the advantage of clients. Discuss estate planning strategies, old and new, that the advisor is likely to encounter, and how to spot problem areas and opportunities for improvement that benefit the client.

10:20 - 10:25 a.m.
Break

10:25 - 11:15 a.m.
C1 - CPA to PFP: How to Get Into the Market
Cromwell Baun, CFA, CFP®, CIMA,
UBS Financial Services Inc., Atlanta, Ga.
Susan Tillery, Susan Tillery CPA/PFS, CFP®,
PARAKLETE® FINANCIAL, INC., Kennesaw, Ga.
Demand for CPA personal financial planners is increasing. Hear how experienced professionals moved from traditional public accounting roles into personal financial planning careers.

C2 - Outlook for the Economy and Markets: Seeing in 3D
Kristina Hooper, Invesco, New York, N.Y.
This presentation explores three themes that are likely to have a substantial impact on economies and markets this year – and beyond. The presentation provides some perspective on the policy responses to the Global Financial Crisis, and how they have impacted our current economic and market environment. The presentation concludes with investment theses and suggested solutions related to the themes that are presented in the presentation.

11:15 a.m. - 12 p.m.
Lunch

12 - 12:50 p.m.
D - Tomorrow Never Knows: An Income Tax Update
Anson Asbury, J.D., LL.M. Asbury Law Firm, Decatur, Ga.
In a wide-ranging discussion, cover the present state of Federal income tax reform, the competing legislative proposals, suggestions from the AICPA and ABA tax sections, and what is on the books right now that may be new or different as we approach the close of 2017.

12:50 - 1 p.m.
Break

1 - 1:50 p.m.
E1 - What is the True Cost of Fraud in Senior Housing?
Victoria L. Collier, Esq., CELA, The Elder Disability Law Firm of Victoria L. Collier PC, Decatur, Ga.
Discuss current fraud trends that are specific to elder client housing issues including frauds in assisted living, property taxes and revers mortgages. Learn how to guide them around traps that could hurt their retirement finances.

E2 - Asset Allocation
Tim Urbanowicz, Invesco, Atlanta, Ga.
Learn the importance of asset allocation in the investment process. Navigate the challenges of allocation classes, diversifying risk, and developing an allocation policy with clients.

1:50 - 2 p.m.
Break

2 - 2:50 p.m.
F - Fiduciary Update
Nikola (Nick) R. Djuric, J.D., Eversheds Sutherland, Atlanta, Ga.
Explore the fiduciary's role in estate planning. Fiduciary duties, choosing alternate fiduciaries, and fiduciary trust agreements.

2:50 - 3 p.m.
Break

3 - 4:15 p.m.
G - What's Next for the Economy and Markets?
Leo Grohowski, MBA, BNY/Mellon Wealth Management, New York, N.Y.
Examine the economic outlook for 2017 and beyond.

REGISTRATION

Event Code: 13050

Name | MI | Last | Member #

Company/Firm Name

Address | City | State | Zip

Phone | Fax | Email

Registration Confirmation: ❑ Mail ***OR*** ❑ Email **Check here if registration includes a change of address:** ❑

PRICING INFORMATION

	Members	Nonmembers	LIVE STREAM Members	LIVE STREAM Nonmembers
Early Registration Fee by October 4	❑ $270	❑ $370	❑ $270	❑ $370
Standard Registration Fee	❑ $330	❑ $430	❑ $330	❑ $430
Late Registration Fee after October 20	❑ $370	❑ $470	❑ $370	❑ $470

Cancellation Policy: Cancellations/Transfers made up to three weeks before the seminar or conference will not incur an administration fee. Cancellations/Transfers made during the Standard Fee time frame are subject to a $50 administration fee. Cancellations/Transfers made within three business days are subject to a $100 administration fee for members; $150 for nonmembers. *Cancellations/No shows on the date of the event forfeit the entire registration fee. No refunds or transfers of course fee will be made after the date of the event.*

BREAKOUT SESSIONS

Choose one session per time slot

10:25 - 11:15 a.m.

❑ C1 - CPA to PFP: How to Get Into the Market

❑ C2 - Outlook for the Economy and Markets: Seeing in 3D

1 - 1:50 p.m.

❑ E1 - What is the True Cost of Fraud in Senior Housing?

❑ E2 - Asset Allocation

MATERIALS

Choose how you wish to receive conference materials

❑ Download eMaterials **No printed materials provided**

❑ Printed Materials **Will receive printed materials**

ITEMS TO NOTE

If you have a specific dietary or other need, please contact the CPE Department at least one week prior to the conference at 404-504-2985 or 800-330-8889, Opt. 3.

If you have special needs under the Americans with Disabilities Act, please attach a written description or call 404-504-2985 or 800-330-8889, Opt. 3.

PAYMENT INFORMATION

❑ Use Money on Account

❑ Check for $____________ made payable to The Georgia Society of CPAs

❑ Amount to charge credit card $____________

❑ Personal Card *OR* ❑ Company Card

❑ Discover ❑ MasterCard ❑ AmEx ❑ Visa

Card Number | Expiration Date

Name as it appears on card

Signature

REGISTER TODAY!

ONLINE registration available at www.gscpa.org

CALL GSCPA CPE Department at 404-504-2985 or 800-330-8889, Opt. 3 to place a credit card order

MAIL your completed registration with credit card information or check made payable to The Georgia Society of CPAs

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