

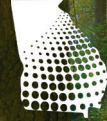
# Personal Financial Planning Conference

October 23, 2019

Event Codes: 13050,  LS13050

GSCPA Learning Center

Atlanta, Georgia



The Georgia Society  
of CPAs

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Personal Financial  
Planning Conference

The Georgia Society  
of CPAs



Six Concourse Parkway  
Suite 800  
Atlanta, GA 30328

# Personal Financial Planning Conference

**October 23, 2019**

**Event Codes: 13050,  LS13050**

**GSCPA Learning Center | Atlanta, Georgia**

**8 hours CPE credit**

**8 hours CFP® credit (applied for)**

Your clients rely on you for estate, tax, retirement, risk management and investment planning advice. Receive the tools and guidance on the latest laws and planning implications to effectively assist your clients.

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## **ATTEND VIRTUALLY**

**Live Stream Event Code: LS13050**

**8 hours CPE credit | 8 hours CFP credit® (applied for)**

Live stream allows you to attend the conference from your home, office or anywhere you can access the internet. You view the sessions in real time as part of the audience and have interaction with other attendees via chat areas. All conference sessions will be live streamed.

**For more information or to register, visit <http://bit.ly/Planning19LS> or call 404-504-2985 or 800-330-8889, Opt. 3.**

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## **TASK FORCE**

Bryce Nations, CPA, CFP, *Frazier Deeter, Atlanta, Ga.*

Doug Neal, *Windham Brannon, Atlanta, Ga.*

Steve Rochen, CPA, *Beecher Carlson, Atlanta, Ga.*

Susan Tillery, CPA/PFS, *Paraklete Financial Inc, Kennesaw Ga.*

# 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 - What Drives Economic Growth?**

*Don Sabbarese, Kennesaw State University, Kennesaw, Ga.*

The U.S. economy as of June 2019 reached an expansion of 120 months, which surpasses the post-WWII's average of 58 months. As a global economic slowdown looms ever more ominous, many economic and financial analysts predict an ultimate U.S. recession, which begs the question; can the Federal Reserve Bank do anything to avoid a recession and what other economic forces are at play? Look at current economic conditions and forces influencing the future.

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

**Networking Break**

**9:05 - 10:20 a.m.**

**B - New Tax Law Overview**

*Rich Wagmen, Pricewaterhouse Coopers LLP, Atlanta, Ga.*

Now that we have worked through one season, how did it go? Discuss pass-through tax deduction, the regulatory environment – S Corps, business entity – choice-of-entity under new tax law, 199A confusion, new forms, and current updates.

**10:20 - 10:30 a.m.**

**Networking Break**

**10:30 - 11:45 a.m.**

**C - Identifying Cyber Risk and Risk Transfer Through Insurance**

*Sean Donahue, Beecher Carlson Insurance Services, LLC, New York, NY*

With the increase in cyber attacks, cyber risk management has become a top business priority. Identify the use of data and technology along with the financial risk associated with the downtime or disclosure, which leads to the transfer of risk to a third party.

**11:45 a.m. - 12:45 p.m.**

**Lunch**

**12:45 - 2 p.m.**

**D - Growing Your Business by Partnering With Other Professionals**

*Zack Cockfield, CFP, AIF, The Cockfield Family Office, Cumming, Ga.*

*Stephen Newland, AFC, Find Your Own Money Path, Atlanta, Ga.*

*John Picardi, Active Financial Group, Atlanta, Ga.*

*Don Bravaldo, CPA, Bravaldo Capital Advisors, Atlanta, Ga.*

Our thought leader panel will facilitate a group discussion designed to be a resource to help you grow your practice. Topics of discussion will include hourly financial counseling for clients that need to get financially stable and/or get out of debt; hourly financial planning for Millennials up to retiree age; clients that are planning for their family or a charitable institution; M&A consulting for business owners; tools you utilize when clients aren't following through; ways that you help move clients forward; and how to handle clients that seem to have the same problems every time you with them.

**2 - 2:10 p.m.**

**Networking Break**

**2:10 - 3 p.m.**

**E - My Client's Medicare, Where Do I Fit In?**

*Keith Nabb, Affordable Medicare Solutions, Suwannee, Ga.*

As our clients – and our family members – age, the topic of Medicare becomes more and more relevant and essential. Understanding Medicare can feel overwhelming to people who have it and for those who work with them. Review the basics of Medicare – how it started, and what it looks like today, and take a look at an overview of Medicare, Medicare Advantage plans, Medicare Supplement Plans, as well as Medicare Part D plans. Learn the details of the recent updates to allow you to inform your clients better, so they can make educated decisions about their health coverage.

**3 - 3:10 p.m.**

**Networking Break**

**3:10 - 4:25 p.m.**

**F - Tax Fraud Case Study**

*Lauren Neal, IRS - Criminal Investigation, Atlanta, Ga.*

Take a closer look at the roles of the taxpayer, bookkeeper, and return preparer in a tax fraud investigation and prosecution.

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## FACILITY

**The Georgia Society of CPAs Learning Center**

Six Concourse Parkway, Suite 800

Atlanta, Ga. 30328

404-231-8676 | 800-330-8889

## HOTEL

**The Westin - Perimeter North**

Seven Concourse Parkway NW

Atlanta, Ga. 30328 | 770-280-9860

Website: [bit.ly/WestinAtlantaGSCPA](https://bit.ly/WestinAtlantaGSCPA)

Please mention GSCPA when making your reservation.

# 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 <b>October 8</b>	<input type="checkbox"/> \$280	<input type="checkbox"/> \$380	<input type="checkbox"/> \$280	<input type="checkbox"/> \$380
Standard Registration Fee	<input type="checkbox"/> \$340	<input type="checkbox"/> \$440	<input type="checkbox"/> \$340	<input type="checkbox"/> \$440
Late Registration Fee after <b>October 19</b>	<input type="checkbox"/> \$380	<input type="checkbox"/> \$480	<input type="checkbox"/> \$380	<input type="checkbox"/> \$480

**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.*

## 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


## MATERIALS

This conference is a paperless conference and all materials will be available electronically as PDFs. Materials will be available to download in advance and participants will receive an email when they are available.

**For more information on eMaterials visit: [ematerials.gscpa.org](http://ematerials.gscpa.org).**

## 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.

## REGISTER TODAY!

**ONLINE** registration available at [www.gscpa.org](http://www.gscpa.org) or <http://bit.ly/Planning-19>

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

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Six Concourse Parkway, Suite 800  
Atlanta, GA 30328

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