



AGENDA - Monday, February 3

7:15am - 7:45 am	Registration and Continental Breakfast		
7:45 am - 7:55 am	Welcome and Opening Remarks		
8:00 am - 8:50 am	Opening General Session - Nathan Whitaker Championship Resilience: 5 Steps to Strengthening Our Ability to Bounce Back		
8:55 am - 9:45 am	General Session - Alan Moore The Future of Financial Planning: 5 Trends Changing How You Do Business Forever		
9:45 am - 10:20 am	Networking break with Resource Partners		
10:25 am - 11:15 am	General Session - Amy Moline Real Estate in Transition: Key Trends Shaping 2025 and Beyond		
11:20 am - 12:10 pm	General Session - Thomas Lorance - Energy Sector Secrets for Financial Advisors		
12:10 pm - 1:15 pm	Lunch with Resource Partners: Sponsored by Franklin Templeton FPA of FL Advocacy - Charlie Fitzgerald		
1:15 pm - 2:05 pm	General Session: Paul Peterson - First Trust 2025 Economic and Market Outlook		
2:10 pm - 3:00 pm	Senior Plan Options- A comprehensive look at Medicare and the Insurance options changes for 2025	Movement Mortgage- Enhance Retirement Outcomes Using Home Equity	Longwood CPA/Contango - Nailing the Niche: Maximizing Business Valuation Before an Exit
	Room change		
3:05 pm - 3:55 pm	Session Repeats	Movement Mortgage- Differentiate Your Practice: Innovative Solutions Utilizing Home Equity	Session Repeats
3:55 pm - 4:15 pm	Networking Break with Resource Partners		
4:15 pm - 5:05 pm	Inland - Tax Advantaged Real Estate Investment Solutions	Andes Risk - The Next Generation Risk Framework	Lido Advisors: Reframing Wealth; Assessing the Quality of your Estate Plan
	Room change		
5:10 pm - 6:00 pm	Session Repeats	Session Repeats	Session Repeats
6:00 pm - 7:00 pm	Cocktail Reception with Resource Partners: Sponsored by TriState Capital Bank		
Accepted CE Hours	9 hrs. CE accepted by CFP Board - 9 hrs. CE accepted by FL. Dept. of Ins.		



AGENDA - Tuesday, February 4

7:15 am - 8:00 am	Registration and Continental Breakfast		
8:00 am - 8:50 am	General Session - Jay Mooreland Becoming Your Clients' Preeminent Financial Influencer		
8:55 am - 9:45 am	General Session - Rob Harvey- Going Beyond Indexing		
9:45 am - 10:20 am	Networking break with Resource Partners		
10:25 am - 11:15 am	General Session - Parker Ence - How Advisors Use Safe AI to Take Meeting Notes, Organize Tasks, Update CRM, Write Recap Emails -		
11:20 am - 12:10 pm	General Session - Mari Adam - How to Talk to Your Clients About College: 4 Easy Steps to Meaningful Conversations		
12:15 pm - 1:30 pm	Lunch with Resource Partners -		
1:35 pm - 2:25 pm	SSGA - Why active Fixed Income makes sense for these turbulent markets	Village on the Green - The Benefits of a Lifecare Contract	Vanguard - Advisor's Alpha, Behavioral Coaching when your clients need it most
	Room Change		
2:30 pm - 3:20 pm	Session repeats	Session repeats	Session repeats
	Break- Grab and go		
3:25 pm - 5:05 pm	Ethics - Sponsored by Columbia Threadneedle Accepted for 2 hr. Ethics CFP and 2 hr. Ethics IAR		
Accepted CE Hours	6 hrs. accepted by CFP Board - 5 hrs. CE FL. Dept. of Ins. 2 hrs. Ethics, and IAR accepted		
Total Accepted CE Hours	15 hrs. accepted by CFP Board and 14 hrs. CE FL. Dept. of Ins. 2 hrs. Ethics, CFP and IAR accepted		