



2017 SESSIONS

SPEAKERS

Mind Bending – No Hallucinogens Required

Renee Snow

Find out how philosophy can change your mind and your practice. Learn about the meaning and purpose of money, how economy and ecology are intertwined, and how money paradigms are formed. This is an interactive discussion where participants will be asked to examine their implicit and explicit assumptions about wealth and consider alternative perspectives. The presentation will delve into topics such as the time and energy elements of money, the overreach of the economy, the psychology of debt and hoarding, how the Western wealth paradigm was created, identification to wealth and how mindfulness may offer new possibilities. Finally, normative Eastern money paradigms will be explored along with a discussion of how to implement these ideas in practice.

Disruption, The Gift You Cannot Give Back

Susan Bradley

Disruption cracks open norms and creates chaos and opportunity. There is an upside to disruption and no profession can capture the positive potential better than a financial planner. Disruption causes change, which leads to transitions, and if we get it right, to transformation. It also causes people to hire you and rely on you for more than asset management. This session covers the science based planning model and tools for taking clients through disruption all the way to transformation. It can be messy without process; with process, it is a good time to be you.

Global Market Outlook

Jeffrey Kleintop

Through monetary policies, trade agreements, and geopolitics, the global economy has become increasingly intertwined. Join Jeffrey Kleintop, CFA, for an in-depth analysis and interactive discussion of trends and events in the global markets and what they mean for U.S. investors. You don't want to miss this one!

The Growing Impact of Donor Advised Funds in Philanthropy and Gift Planning

Pamela Doherty

Last year, for the first time, a commercial charitable Gift Fund knocked United Way Worldwide out of the No. 1 spot in The Chronicle of Philanthropy's annual ranking of charities that raise the most in private support. This changing of the guard in American philanthropy is a sign of how the charitable giving landscape and donor interests are evolving. What are the trends related to Donor Advised Funds? What are the implications for charities, donors and professional advisors? Pamela Doherty of The San Francisco Foundation will explain and discuss DAFs, and will share suggestions how you can incorporate the option and the topic of philanthropy into your work with clients.

Divorce Planning + Air Math = Trouble

Bonnie Sewell

Over the years, there are two things we know: 1) that math modeling MATTERS in divorce and 2) the cruelest divorce myth – that someone not specifically trained in personal finance can do your financial analysis for a Property Settlement Agreement. Divorce happens and it doesn't have to destroy lives. Bonnie will review the analysis and modeling to enable individuals to cost effectively understand the financial pieces being negotiated. By putting financial analysis at the beginning of the process, modeling can be used to develop and demonstrate financial security post-divorce, eliminate inept financial arrangements and address financial issues associated with the cost of raising children post-divorce.

Pride, Prejudice & Probability: Lifting the Veil to Reveal Possibility

Don St. Clair

We live in challenging times. While the future has always been uncertain, the speed and complexity of today's change is leaving many behind – disoriented and struggling to cope. What worked in the past appears no longer adequate. Knowledge and information, once stable sources of economic power, are no longer enough. The future demands new skills, new sensibilities, and a new way of being. Discover how our everyday common sense notion of language and communication blinds us to possibility, constraining our capacity to reinvent financial reality with others. And discuss what it means To BE... a CFP® in the 21st Century.

Risk Management Potholes!

Brian Trouette

As clients use their wealth to create wonderful homes and rewarding lives, they often create gaps in coverage without realizing it. Advertisements urge clients to “switch and save” or to use “good hands” without any meaningful metrics, instead using humor and songs. In client risk management reviews, are you just looking at the declaration pages? What internal policy (sub) limits are in their policies that can cause very unpleasant surprises and throw your client relationship out of alignment? Brian will walk us through how to find and identify those provisions that often reduce or exclude coverage and create large out of pocket costs.

Technology is Eating Real Estate

Mike Consol

Technology is banging on front doors of real estate edifices of all kinds, and it is not unreasonable to think of the advanced structures of tomorrow being operated by the equivalent of HAL from 2001: A Space Odyssey (though, one would hope, without insubordinate and homicidal tendencies). Think in terms of buildings with nervous systems, structures packed with sensors feeding information to learning neural networks that automatically respond to internal and external environments, much as the human body does. Envision entire complexes of buildings networked together and sharing information while creating and allocating resources such as energy, pollen-free air and drinkable water. Yes, creating a built environment that operates as an ecosystem, replete with symbiotic relationships. What should we be thinking and planning for our clients in the real estate sector?

What you DON'T know about Millennials

Yusuf Abugideiri, Russell Kroeger

The presenters (yes, they're both Millennials...) will describe their three-step framework for taking Millennial clients through the financial planning process. How do you meet their needs while speaking to their worldviews and unique generational traits? Yusuf and Russell will explain how they've incorporated ideas from the profession's existing body of knowledge, along with research in the fields of psychology and education, to develop their framework. Lastly, they will explore several reasons that substantiate the need to launch a Millennial service-offering at your firm...really, really soon.

Wisdom in Our Midst

Various

This will be a free-wheeling session composed of a panel of Roundup participants answering questions that have been submitted by the other participants on any planning-related topic.

Schedule

Friday, 8/11

TIME	TOPIC	SPEAKER
8:30-10:10	Mind Bending – No Hallucinogens Required	Renee Snow
10:20-12:00	Disruption, The Gift You Cannot Give Back	Susan Bradley
1:30-3:10	Global Market Outlook	Jeffrey Kleintop
3:20-5:00	The Growing Impact of Donor Advised Funds	Pamela Doherty

Saturday, 8/12

TIME	TOPIC	SPEAKER
8:30-10:10	Divorce Planning + Air Math = Trouble	Bonnie Sewell
10:20-12:00	Pride, Prejudice & Probability: Lifting the Veil to Reveal Possibility	Don St. Clair & friends
1:30-3:10	Risk Management Potholes!	Brian Trouette
3:20-5:00	Technology is Eating Real Estate	Mike Consol

Sunday, 8/13

TIME	TOPIC	SPEAKER
8:30-10:10	What you DON'T know about Millennials	Yusuf Abugideiri, Russell Kroeger
10:40-12:00	Wisdom in Our Midst	Various