

6th Annual Symposium ~ Paving the Road to Recovery Thursday, June 16, 2011

University of Miami BankUnited Center's Multipurpose & Hurricane 100 Rooms
1245 Dauer Drive, Coral Gables, Florida

AGENDA

- 8:00 - 8:45 AM** REGISTRATION, CONTINENTAL BREAKFAST AND NETWORKING WITH SPONSORS
- 8:45 - 9:00 AM** WELCOME AND INTRODUCTIONS
- 9:00 - 9:50 AM** ***THE ECONOMY UNDER THE "NEW NORMAL" – IMPLICATIONS FOR THE FINANCIAL PLANNING INDUSTRY***
J. ANTONIO "TONY" VILLAMIL ♦ Dean, St. Thomas University School of Business; Principal Economic Advisor, The Washington Economics Group, Inc.
This session will be an assessment of the characteristics of the "New Normal" economy since the 2008 - 2009 recession. Among factors for discussion are: indicators to track the "New Normal" economy; U.S., Florida and South Florida Economic Perspectives; and "Winners and Losers" under the "New Normal" environment.
- 9:50 - 10:00 AM** BREAK AND NETWORKING WITH SPONSORS
- 10:00 - 10:50 AM** ***UNDERSTANDING TACTICAL ASSET ALLOCATION***
MICHAEL E. KITCES, MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL, CWPP™ ♦ Publisher, *The Kitces Report*; Blogger, *Nerd's Eye View*; Director of Research, Pinnacle Advisory Group
Most financial planners have been taught the principles of managing portfolios using traditional buy-and-hold techniques, yet in reality very few planners actually strategically hold the exact same portfolio today that they did 5, 10, or 20 years ago, and instead have made some form of "tactical" shifts over time. In this session, participants will gain a better understanding of some of the theoretical underpinnings of buy-and-hold strategic asset allocation, and how tactical asset allocation can simply be a natural extension of this methodology. In addition, the session will explore the practical approaches used, and challenges faced by, those who adopt tactical asset allocation.
- 10:50 - 11:10 AM** BREAK AND NETWORKING WITH SPONSORS
- 11:10 AM - 12:00 PM** ***INVESTMENT PLANNING IN A LOW RETURN ENVIRONMENT***
HAROLD R. EVENSKY, CFP®, AIF® ♦ President, Evensky & Katz
There is an overwhelming consensus that real equity returns for the next decade are likely to range from 3% to 6%. In such an environment, multi-asset multi-style equity portfolios may no longer be an appropriate design for the retail investor. This session will consider alternatives.
- 12:00 - 12:15 PM** BREAK AND NETWORKING WITH SPONSORS
- 12:15 - 1:40 PM** LUNCHEON PRESENTATION
FAST TRACK TO MASTERING MEDIA RELATIONS SKILLS
Panelists: **LISA GIBBS** ♦ *Money Magazine*; **MARQUEETA CURTIS-HAYNES** ♦ *PBS Nightly Business Report's Money Profiles*; Moderator: **PHILIP HERZBERG**
This interactive panel discussion will focus on providing participants with interview insights and public relation skills to effectively share their professional expertise with media sources.
- 1:40 - 2:30 PM** ***LOOKING AHEAD ON THE ROAD TO RECOVERY***
Panelists: **MICHAEL E. KITCES, HAROLD R. EVENSKY, THOMAS R. ROBINSON, and MARK TIBERGIEN**; Moderator: **DAVE MORAN**
This panel discussion, featuring some of our industry's top leaders, will discuss the opportunities and challenges ahead in the next decade. How will these changes impact the planning profession and practice management? How can we apply these challenges to create a bright future for our industry?
- 2:30 - 2:40 PM** BREAK AND NETWORKING WITH SPONSORS

2:40 - 3:30 PM

WHAT WEALTH MANAGERS NEED TO KNOW ABOUT PERFORMANCE MEASUREMENT IN 2011 AND BEYOND

THOMAS R. ROBINSON, PHD, CPA, CFP®, CFA ♦ Managing Director, Education Division, CFA Institute

This session will examine recent trends in performance measurement and attribution and how the wealth manager can evaluate the performance of money managers, mutual fund managers, and other portfolio managers using macro and micro-attribution. The session will include a discussion of after-tax performance measurement.

3:30 - 3:50 PM

BREAK AND NETWORKING WITH SPONSORS

3:50 - 4:40 PM

MISSION POSSIBLE

MARK TIBERGIEN ♦ Managing Director, Pershing, a BNY Mellon Company; CEO, Pershing Advisor Solutions

In this economic climate, advisors need to take significant measures to protect profits while simultaneously developing processes around operations. This in-depth analysis of the operational risks facing the advisory industry and the critical role human capital plays in helping to manage these risks will highlight the recommendations detailed in Mission Possible II. In this session, you will understand the wide range of operational risks confronting advisory firms today which, if ignored, will create a slow erosion of operational efficiency that will adversely impact profitability and ultimately the quality of client service.

4:40 - 5:00 PM

WRAP UP, EVALUATION AND NETWORKING WITH SPONSORS

~ APPROVED FOR 5 HOURS OF INSURANCE AND CFP CE; 8 HOURS OF CPE CE; 6 HOURS OF CLE CE ~

REGISTRATION FORM

REGISTRATION FEES

5/1/11 - 5/31/11: FPA Members - \$150.00 / Non-Members - \$175.00
6/1/11 through event: FPA Members - \$175.00 / Non-Members - \$200.00
Full-time Students: \$49.00

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Questions? 786-390-7655 ♦ info@fpamiamidade.org ♦ www.fpamiamidade.org

Cancellations received in writing by June 9, 2011, will receive a full refund, less a \$25 administrative fee. There will be no refunds after June 9, 2011. Registrations are non-transferable. All fees must be paid in advance. By your signature above, you hereby authorize FPA of Miami-Dade to debit your credit card for the total amount, and have read and understand the cancellation/refund policy of this registration agreement. Program subject to change. Please contact us with any special access or dietary needs.