FPA FINANCIAL PLANNING ASSOCIATION OF NORTHERN NEW ENGLAND

2017 CONTINUING EDUCATION SERIES

53 Regional Drive, Suite 1 • Concord, New Hampshire • 03301

JOIN US FOR OUR NEXT CONTINUING EDUCATION SEMINAR AND A CHAPTER MEMBER MEET & GREET EVENT THE NIGHT BEFORE!

Friday, October 20, 2017 • Portland Regency Hotel & Spa, 20 Milk Street, Portland, ME

See the other side for details about the Meet & Greet on Thursday night, October 19!

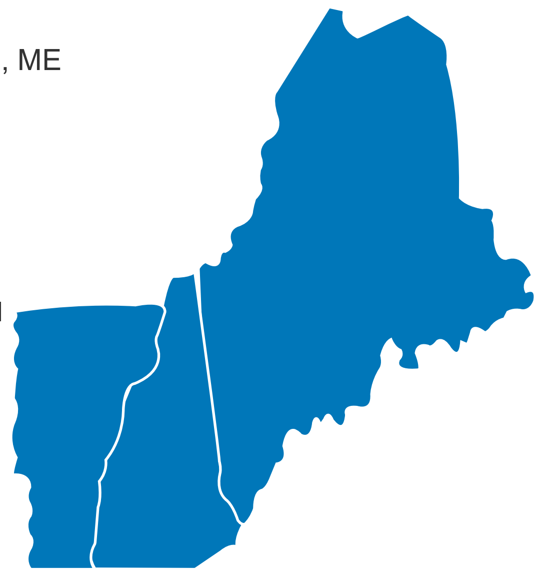
ATTENTION FINANCIAL PLANNING PROFESSIONALS!

Attend and earn 4.0 CFP CEs

WILL YOU NEED AN OVERNIGHT GUESTROOM?

Call the Portland Regency Hotel & Spa at 1-800-727-3436 to secure a room at the special FPANNE rate of $149 plus tax when reservations are made by September 29, 2017.

FPA Member-Get-A-Member Participants Receive a Free Meeting & Benefits from FPA National. Have you referred someone who joined FPA and our local chapter as a paying member? If so, please indicate below and provide the name of the referred member(s) and we will waive the primary program cost.



REGISTRATION FORM

NEW! YOU MAY REGISTER ONLINE AT http://conta.cc/2w3a5RA USING PAYPAL AND A CREDIT CARD.

Primary Program Cost: $50.00 FPA members, $80.00 non-members

Name (include designations): ________________________________

Mailing Address:____

CFP#:____________________ Insurance Lic. #:_______________

I am a FPA chapter member (in good standing) Yes No

FPA Member-Get-A-Member Participant? Yes No

If yes, name of at least one new member ________________________

My Broker Dealer is: ______________________________________

Company: ______________________________________

Phone: ________________ Email: ________________

I am an IAR: Yes No

I am an RIA: Yes No If yes, Broker Dealer: ____

Sign-in sheets will require your CFP number & your Social Security #. Please make check payable to FPANNE. Payment must accompany registration form.

I will attend:

____ October 20, 2017 primary program
(Registration opens at 8:00 am)
FPANNE member: $50 / $80 on-site
Non-Member: $80 / $100 on-site

Total Amount Enclosed: _________________

**Additional $20.00 to register on-site*

I will attend the Thursday evening, October 19 Member Meet & Greet (5:30-7:00 p.m.) at the Portland Regency Hotel & Spa, 20 Milk Street, Portland, ME

___ Yes ___No

Register online or via mail to:
Financial Planning Association of Northern New England
Attention: Seminar Registration
53 Regional Drive, Suite 1, Concord, NH 03301

FPA FINANCIAL PLANNING ASSOCIATION OF NORTHERN NEW ENGLAND

2017 CONTINUING EDUCATION SERIES

PORTLAND REGENCY HOTEL & SPA

20 Milk Street, Portland, ME 04101
Hotel Reservations: 1-800-727-3436

Register online at http://conta.cc/2w3a5RA using PayPal and a credit card.

Join Us for an FPA Chapter Member Meet & Greet at Portland Regency Hotel & Spa from 5:30 - 7:30 pm, Thursday, October 19!

(Open to all FPA members...registration for the October 20 program is not required to attend.) Learn more about chapter activities and get to know other members.

OUR SPONSORS:

Ballentine Partners
Charles Schwab
Lifecare Funding
Wellesley Investment Advisors
First Trust
Vanguard
BBIM Bill Bonk Insurance Marketing
Morningstar
MFS
True North Networks

OCTOBER 20, 2017 SEMINAR SCHEDULE:

8:00 am — **Registration, Continental Breakfast, Meet with Sponsors**

8:45 am — **Welcome and Sponsor Introductions**

9:00 - 9:50 am — **How and When to Amend Irrevocable Trusts**
Jana Magnuson, Pierce Atwood, Portland, ME
(Approval pending for 1.0 CFP CE)

The passage of time and changes in law or circumstances can come to hinder effective administration or distribution of irrevocable trusts. How can irrevocable trusts be legally amended or reformed, when such trusts are affirmatively not subject to amendment? Trust law views a trust settlor's "intent" as sacrosanct, and embodied in the trust terms. So how can the parties bend those terms, and how far? This presentation will review various mechanisms for modifying irrevocable trusts, and consider the key risks and tax considerations for determining whether and how such trusts can be modified under current law.

9:50 - 10:00 am — **Sponsor Presentations**

10:00 - 10:50 am — **Retaining Heirs: Connecting with the Next Generation of Clients**
Maria Quinn, Vanguard, Valley Forge, PA
(Approval pending for 1.0 CFP CE)

The forthcoming intergenerational wealth transfer presents a significant shift in the financial industry. This session explores ways that advisors can create deeper relationships with clients and their heirs and more successfully connect with a new generation of investors. Topics include: generational views on money, investing, and communication; ways to create more enduring bonds with families; effectively communicating with a younger generation; and action steps to help navigate the shift in wealth while retaining assets and engaging new clients.

10:50 - 11:00 am — **Sponsor Presentations**

11:00 - 11:50 am — **Mastering Social Security**
Karen Ireland, MFS Investments, Boston, MA
(Approval pending for 1.0 CFP CE)

Deciding when to claim Social Security benefits is one of the most important retirement decisions clients will make. For married clients, it can be especially complicated. This presentation reviews the top mistakes when estimating spousal benefits, the recent changes to Social Security, and how to coordinate benefits. It also discusses the options that are available to clients who are widowed, divorced, or worked in a government position that did not pay into Social Security. After leaving the session, advisors will be armed with information to answer most Social Security questions.

11:50 am - 12:00 pm — **Sponsor Presentations**

12:00 - 1:00 pm — **Lunch & Sponsor Presentations**

1:00 - 1:50 pm — **Protecting You and Your Clients From Cyber Threats**
Steven Ryder, True North Networks, Keene, NH
(Approval pending for 1.0 CFP CE)

While the news on Cybercrime can seem daunting and the regulations overwhelming, there are techniques that won't break the bank to protect your network and reduce the likelihood of a data breach. Join this session for steps you can take to protect your company and your clients.