Thursday, November 20

Networking Dinner

5:30 P.M.	Registration and reception
6:30 P.M.	Dinner
7:30 P.M.	**Keynote Address:** ***The Diverse Roles of Young Professionals in Financial Planning*** Kate Healy, Managing Director, Institutional Marketing, TD Ameritrade Institutional

The purpose of the Networking Dinner is to connect professionals with students to discuss the profession of financial planning, the career opportunities available, and the possibilities for internships.

Seating will be assigned to place approximately equal numbers of students and financial planners at each table.

Planners are encouraged to describe their typical days and the career paths that brought them to their current positions. Students are encouraged to ask about the opportunities in the financial planning and the preparation needed for success in this profession.

Dinner Menu

Herb Roasted Pork Loin with Jezebel Sauce

Coq au Vin

Brown and Wild Rice Blend

Haricot Verts with Lemon Sauce

Chopped Romaine with Granny Smith Apples and Dried Cranberries

Fresh Baked Dinner Rolls

Old Fashioned Peach Cobbler

Catering by *Jezebelles Catering & Specialty Foods*

Friday, November 21

Agenda

7:30 A.M. - 8:30 A.M.	Registration and coffee
8:30 A.M. - 8:45 A.M.	Welcome and Introductions
8:45 A.M. - 9:45 A.M.	***Better Retirement Exit Strategies with Life Insurance*** Joe Chenoweth, CLU, ChFC, AEP, Vice President, Estate & Financial Planning, ARMOR Wealth Management, Addison, Texas
9:45 A.M. - 10:00 A.M.	Break
10:00 A.M. - 11:00 A.M.	***Tax-Efficient Withdrawal Strategies During Retirement*** Dr. William Reichenstein, CFA®, Professor and Powers Chair in Investment Management, Baylor University
11:00 A.M. - 11:15 A.M.	Break
11:15 A.M. - 12:15 P.M.	Program Update and Recognitions
12:15 P.M. - 1:15 P.M.	Lunch
1:15 P.M. - 2:15 P.M.	***How Will Likely Social Security and Medicare Reforms Impact Your Clients?*** Dr. Thomas R. Saving, Distinguished Professor, Jeff Montgomery Professor in Economics, and Director of the Private Enterprise Research Center, Texas A&M University
2:15 P.M. - 2:30 P.M.	Break
2:30 P.M. - 4:00 P.M.	***Succession Planning: Making Multi-Generation Ownership Work*** David Grau, Founder and President, FP Transitions, Lake Oswego, Oregon
4:00 P.M. - 6:00 P.M.	Reception