



FINANCIAL
PLANNING
ASSOCIATION
HAWAII

FPA of Hawaii SYMPOSIUM – November 3, 2022 at Oahu Country Club

8:00 – 8:30 am: Visit with Partners & Refreshments

8:30 – 9:30 am:

Topic: Guide to the Markets – Opportunities & 2023 Outlook

(Accepted for 1 CFP® CE credit)

The Guide to the Markets provides an effective framework for understanding the global market and economy. This quarterly-updated presentation is aimed at developments within the markets and how it affects various investments and asset classes. It is designed to present statistics and data through charts and graphs, in a way to address the markets and the economy based on logic rather than emotion while supporting their efforts to help clients make sound investment decisions.



Speaker: John “Jack” Manley, VP, Global Market Strategist – J.P. Morgan

Jack is responsible for delivering timely market and economic commentary to institutional and retail clients across the United States and Canada. In addition, he is a contributor to the J.P. Morgan Long-Term Capital Market Assumptions and has authored numerous papers on both global and domestic economies and capital markets. Jack joined J.P. Morgan in 2013 as a member of the Asset Management Strategy & Business Development Team, where he worked on various strategic initiatives across the firm. He has been in his current role since 2016. Jack graduated from the University of Chicago with a Bachelor’s degree in History.

9:30 – 10:30 am:

Topic: An Introduction to Climate Investing – Carbon Pricing & Energy Transformation

(Accepted for 1 CFP® CE credit)

From carbon allowances and carbon offsets to companies in traditionally high emissions industries that are on the cusp of the transition away from fossil fuels to renewable technology—there is extensive investment opportunities emerging from these dynamic and fast-evolving markets. The current global energy crisis has brought to the forefront the need to dramatically scale up energy efficiency and transition to alternative, cleaner energy sources. A combination of increasing government policy, growing investor interest, and falling technology costs is helping to collectively support these markets and bring us closer to global emission reduction goals.



Speaker: Bill Fagan, Head of West Coast – KraneShares

Bill joined KraneShares to expand the firm's partnerships with financial advisors, broker/dealers, and institutions across the west coast. Bill brings KraneShares' solutions and expertise in both exchange traded funds and the Chinese investment landscape to investors throughout the western states. He has spent his career helping financial professionals build portfolios to solve the needs of their clients through retirement planning and asset allocation assistance. He received his Bachelor's degree in Science from Duquesne University, with a focus in Finance & Investment Management.

10:30 – 11:30 am:

Topic: The Playbook for Hosting Successful HNW Family Meetings
(Accepted for 1 CFP® CE credit – Quest CE #300110)

Through detailed interviews with top performing advisors, their insights, tools, proper probing questions, and agendas to help client families to better listen and communicate in a formal Family Meeting will be shared. The data tells us that over 70% of client assets are depleted within the first generation of transfer, typically in the first 10 years, which suggests that communicating clearly and often with the children is imperative for family assets to have generational longevity.



Speaker: Mark B. Warren, Managing Director – MFS

Mark Warren is a Managing Director of MFS Fund Distributors, Inc. He joined MFS in 1990 and has more than 30 years of experience in the financial services industry. Mark's Power Brand program helps advisors run competitive, growing practices by using personal branding & persuasion to enhance selling skills. Mark earned both a Master of Business Administration in marketing & a Bachelor's degree from the

University of San Diego.

11:30 am – 12:00 pm: Visit with partners

12:00 – 1:15 pm: Lunch & CFP® CE Program

Topic: Navigating Hawaii's Changing Real Estate Market For Long Term Success
(Accepted for-1- CFP® CE credit)

With the abrupt rise in interest rates, looming fears of recession, and changes in housing preference, it can be difficult to understand how to navigate the Hawaii real estate market. Learn how these factors can affect buyers or sellers in the current market and how you can set expectations for a successful outcome. Although the current changes in the market may influence decisions of whether to buy or sell in the short-term, there are other long-term considerations that should affect your overall decision making. Understanding these broader implications will help you and your clients make the best choices for their future in real estate.



Speaker: Brandon Lau ®, Partner – Chaney Brooks Choice Advisors

Brandon's 21 years in real estate led him to become a Partner at ChaneyBrooks Choice Advisors. Over the past 13 years, he has developed the team and systems that have created a high level of service and value for his clients. What differentiates Brandon and his team is his consultative approach to real estate. He advises clients with relevant data and expert insight to help them make the best choices in real estate. Good choices in planning for long-term dispositions, negotiating for the best price, or knowing when not to pursue an investment are ways his consultative services will give you an advantage in the marketplace.

His bottom line is providing service with the utmost integrity and expertise.

1:30 – 3:30 pm:

Topic: Ethics CE – CFP® Board's Revised Code & Standards (Virtual program)
(Accepted for 2 CFP® Ethics CE credits)

This course is the latest CFP® ETHICS course from the Candura Group. Dan will be using polls, videos and case studies to keep you involved and learning in this engaging session.

Learning objectives:

- 1) Structure and content of the revised Code and Standards, including significant changes from prior rules.
- 2) CFP® Board's Fiduciary Duty.
- 3) Identify Material Conflicts of Interest and How to Avoid, or Fully Disclose, Obtain Informed Consent, and Manage Them.
- 4) Duty to Report to CFP Board and the Duty to Cooperate.
- 5) Identify the Practice Standards When Providing Financial Advice that Requires Financial Planning or Financial Planning.
- 6) Provide Information to Clients When Providing Financial Planning and/or Financial Advice.



Speaker: Dan Candura, CFP® – The Candura Group

A favorite... Dan provides financial advice and education to consumers and financial professionals. He is founder of his own education and consulting firm Candura Group, LLC. In that role he provides ethics training across the United States, Canada and Europe through in-person courses and webinars. Dan taught financial planning, insurance planning and retirement planning in the Sawyer School of Business at Suffolk University in Boston and is also a FINRA arbitrator. Dan serves as the CFP® Ambassador for the Boston area and is a member of FPA and a NAPFA registered financial planner.

Our confirmed partners:



Registration Form – Deadline to Register: October 26, 2022

Name: _____ Phone: _____

Email: _____ CFP ID: _____

Guest Name: _____ CFP ID: _____

Enclosed is my payment of \$ _____

Make your check payable to: FPA Hawaii

Mail to: 516 Kawaihae Street E, Honolulu, HI 96825

You can also pay via credit card/PayPal at: www.fpahawaii.org under 'Coming Events'

Cancellations must be received by October 27, 2022 for a full refund.

FPA Members:

\$159 – full day (includes lunch & ethics program)

\$99 – ½ day for morning programs & lunch (no ethics program)

Guests (not FPA member):

\$169 – full day (includes lunch & ethics program)

\$109 – for morning programs & lunch (no ethics program)

Questions: Contact Cynthia Takenaka at 808-394-3451 or email at: admin@fpahawaii.org

Mahalo for Attending!

www.fpahawaii.org

www.onefpa.org

ONE
CONNECTION™ for CFP® Professionals



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