FINANCIAL PLANNING ASSOCIATION

HAWAII

SYMPOSIUM – November 2, 2023 at Oahu Country Club

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

8:30 – 9:30 am **Topic: Millennial Investing Trends**
(Accepted for -1- CFP® CE credit – Quest CE)

With the massive generational wealth transfer underway, gain insight into the millennial demographic, how they communicate and the magnitude of the generational wealth transfer. Learn how you can help navigate their investment needs and hear what investments can help millennial investors reach their financial goals.

Speaker: Jack Manley, Global Market Strategist – JP Morgan Asset Management
Mr. Manley is responsible for delivering timely market and economic commentary to institutional and retail clients across the United States and Canada. In addition, he has authored numerous papers on both global and domestic economies and capital markets. Jack is also a frequent guest on CNBC, Bloomberg, BNN and other financial news outlets and is often quoted in the financial press. He graduated from the University of Chicago with a Bachelor's degree in History.

9:30 – 10:30 am **Topic: Is 60/40 Dead? Long Live 60/40? Portfolio Construction For The Decade Ahead** *(Accepted for -1- CFP® CE credit)*

The death of 60/40 has been debated endlessly over the past decade, leading to a crescendo in 2022 with the consensus declaring 60/40 being dead and then declaring long live 60/40. To deal with this schizophrenia, the track record of consensus, whether it be on bond forecasting (the 40 of the 60/40), stock forecasting (the 60 of the 60/40) and Fed forecasting will be examined. Then keying in on the main driver of 60/40's success or failure, and what common mistakes advisors make in constructing portfolios. Whether adding alternatives is the answer and how to position globally in constructing the strategic portfolio will be dissected. Finally, behavioral finance will be discussed as to what is the most important factor in helping your clients achieve their wealth goals with a 60/40 portfolio.

Speaker: Paul Ma, CFA®, Vice President, Lead Portfolio Strategist – Fidelity Investments
Mr. Ma assists the nation's leading investment professionals to resolve broad portfolio concerns. He joined Fidelity in 2015. Previously, he

served at Putnam, SunAmerica, BlackRock and is a co-founder of LifeHarbor. He earned his Bachelor of Arts in Chemistry from Harvard and his MA from MIT.

10:30 – 11:30 am **Topic: Mastering Social Security**
(Accepted for -1- CFP® CE credit – Quest CE)

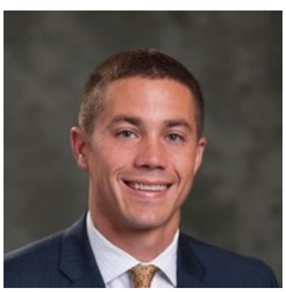
This presentation reviews the top mistakes when estimating spousal benefits, the recent changes to Social Security, and how to coordinate benefits. For married clients, it can be especially complicated. It also discusses the options that are available to clients who are widowed, divorced, or worked in a government position that did not pay into Social Security.

Speaker: Robert Van Riper, Senior Sales Representative – MFS
Mr. Van Riper works exclusively with financial advisors in the western region focusing on Social Security planning. He started at MFS in 2014 and has been in his current position since 2018. He earned a Bachelor of Science degree in Finance from the University of West Florida.

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

12:00 pm – 1:15 pm Lunch
Topic: Retain Your Brain *(Accepted for -1- CFP® CE credit)*

More and more research reveals a powerful message: that we—not our genes—can have control over our cognitive health today and the long-term destiny of our brains. Financial professionals already focus on helping ensure a client's wealth lasts as long as the client lives. Can we financially prepare for the possibility of cognitive decline and prevent or at least slow, the aging of our brains? Tips will be shared to ensure that our client's brain health lasts longer too.



Speaker: Joshua West, CIMA®, Regional Vice President – Hartford Funds
Mr. West has been with Hartford Funds since 2013 and from 2005 – 2008. He also represented Fidelity as a Regional VP and at Merrill Lynch as an internal annuity specialist. He earned his Bachelor of Science from the University of Florida and his CIMA® certification in 2013.

1:30 – 2:30 pm **Topic: 2022 Headwinds…2023 Tailwinds? It Needs To Be So Bad To Be Good** *(Accepted for -1- CFP® CE credit)*

This presentation will address: the economic outlook for the US economy, the outlook for earnings, views on the future path of interest rates, key risks over the coming quarters and provide an all-encompassing look at market dynamics. Lastly, some thoughts on portfolio positioning and where the best opportunities are in the coming quarters for both equities and fixed income allocations.

Speaker: Jack Janasiewics, CFA®, Portfolio Manager & Lead Portfolio Strategist – Natixis Investment

Mr. Janasiewics has over 20 years of investment experience and is now responsible for providing insight and analysis on global economic and capital market themes and their impact on portfolio construction and asset allocation. He holds a BA in economics and an MA in economics from Boston University.

2:30 – 3:30 pm *(final program of the day – don't fall asleep!)*

Topic: Understanding Sleep and Anxiety for Optimal Performance
(no CFP® CE credit)

Understand sleep and unlock its power. Melissa Milanak, PhD, will share insightful information about the science and practicalities of sleep. She gives an exploratory talk encompassing active learning, conveying how sleep works, as well as sharing techniques on how to optimize your sleep. Additional topics covered include: the circadian rhythm, insomnia, food and beverage impact, how to shut off your mind, morning and evening routines, light and technology influences, anxiety, and exhaustion. Dr. Milanak will help you to optimize and renew your energy, motivation, and performance, leading to rebalanced lifestyle choices. This session sets you off on the right track to begin optimizing your sleep to achieve revitalized performance.

Speaker: Melissa Milanak, PhD, Clinical Psychologist – Mind Impact Consulting

Dr. Milanak founded MIND Impact Consulting, transforming her passion for helping others succeed and decades of research and clinical expertise in anxiety, sleep disorders, stress, and trauma into effective practical application for business executives and their organizations. After completing her Bachelor's degree at Bucknell University, she then earned her PhD in clinical & community psychology from the University of Illinois at Urbana-Champaign.

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ONE CONNECTION for CFP® Professionals

Registration Form – Deadline to Register: October 25, 2023

Name:____ Phone: __________________

Email:____ CFP ID: _________________

Guest Name: ____________________________________ CFP ID:_________________

FPA Members: $99.00
Guests (not FPA member): $109.00

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

Cancellations must be received by October 27, 2023 for a full refund.

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

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FPA FINANCIAL PLANNING ASSOCIATION HAWAII

Our confirmed partners:

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