ONE CONNECTION™ for CFP® Professionals

FPA of Hawaii SYMPOSIUM – November 4, 2021 at Dave & Busters (Paina Hale)

FPA FINANCIAL PLANNING ASSOCIATION OF HAWAII

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

8:30 am – 9:30 am:

Presenter: Peter Hamburger – Vice President, JP Morgan Asset Management

Peter helps drive the firm's product research and intellectual capital relating to industry trends and product solutions. He also helps to develop portfolio construction trainings with the goal of helping advisors make more informed decisions about manager selection and portfolio construction.

A J.P. Morgan employee since 2016, Peter previously worked for nine years as a financial advisor at UBS, where he was responsible for trading and portfolio management for a large wealth management team. He earned a B.A. in economics and political science from the University of Notre Dame, and holds Series 7 and 63 licenses.

Topic: Building Stronger Portfolios With Better Insights
(Accepted for 1 CFP® CE credit)
A primary responsibility of a financial advisor is to get their clients invested and keep them invested. This objective requires you to construct portfolios by positioning the client's asset allocation, selecting investments and review on an on-going basis. Real life case studies and interactive tools will bring the information to life. Actionable takeaways to diversify portfolios and/or construct a better process for building portfolios will be shared.

9:30 am – 10:30 am:

Presenter: Andrew Opdyke, CFA – Senior Economist, First Trust Advisors

Andrew is responsible for analyzing economic indicators, writing commentaries and producing blogs. He regularly presents to financial professionals and associations across the U.S. Andrew received an MBA from Northwestern University's Kellogg Graduate School of Management and BA in business and economics from Hope College. He's a member of the CFA Institute and CFA Society of Chicago.

Topic: Current Perspective
(Accepted for 1 CFP® CE credit)
From a historic decline in activity to one of the quickest rebounds on record, 2020 was an

unprecedented year. Unprecedented in the shutdown of the economy, unprecedented in the response out of Washington D.C., unprecedented in the way it impacted individuals and communities around the world. But since the roll out of vaccines in the U.S., the focus has turned to the pace – and sustainability - of the recovery. Andrew will dig into the data - from income to spending, employment to inflation - as we explore what has us on track for the fastest year of economic growth in nearly four decades.

10:30 am – 11:30 am:

Presenter: Joshua West, CIMA®– Regional Vice President, Hartford

Joshua 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.

Topic: 8000 Days of Retirement – An Entire Phase of Your Life Waiting To Be Invented (238955)
(Accepted for 1 CFP® CE credit)
You can provide more information for your clients if you can understand and anticipate what they'll see in their retirement ahead. Client conversations about a "structure" for retirement - 8,000 days of retirement can be broken down into 4 phases….honeymoon, big decision, navigating longevity, and the solo journey. You can serve as the curator for this unchartered life phase. Help your clients plan and prepare for an exciting retirement and what it could really look like. MIT AgeLab's insights will be shared.

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

12:00 pm – 1:15 pm:

Lunch Speaker: Caroline Sakai, PhD – Thought Field Therapy Center

Dr. Sakai's goal has been to empower people to enhance their functioning and optimize their health through the most efficient modalities, and to utilize methods which clients can practice themselves. Learn a simple but valuable tapping tool on your meridian points and some tips taking better care of ourselves through this ongoing pandemic.

TFT Center is run by Dr. Caroline Sakai, an authorized trainer of Callahan Techniques Thought Field Therapy. She was introduced to Dr. Callahan and TFT while working at Kaiser Behavioral Health Services where she was former Chief Psychologist. She had been a practicing clinical therapist since 1966. She has masters degrees in Social Work and Psychology, and her Ph.D. in Clinical Psychology. Dr. Sakai currently is in full time private practice in Honolulu where she does individual therapy with adults, children and adolescents, couples and family therapy, as well as consultations.

1:15 pm – 3:15 pm:

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.

Topic: Ethics CE – CFP® Board's Revised Code & Standards
(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.

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Registration Form – ***Deadline to Register: October 28, 2021***

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
Or pay via credit card/PayPal at: www.fpahawaii.org

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

For FPA Members:
$149 – full day (includes lunch & ethics program)
$89 – ½ day for morning programs & lunch (no ethics program)
$50 – virtual program (ethics program ONLY)

For Guests (not FPA member):
$159 – full day (includes lunch & ethics program)
$99 – ½ day for morning programs & lunch (no ethics program)
$75 – virtual program (ethics program ONLY)

FPA FINANCIAL PLANNING ASSOCIATION OF HAWAII

FPA of Hawaii is registered with the Hawaii State Board of Public Accountancy as a sponsor of continuing professional education. Complaints regarding registered sponsors may be addressed to: Hawaii State Board of Accountancy, PO Box 3469, Honolulu, HI 96810.

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