

2012 Financial Planning Symposium

Thursday, November 8

5:00 – 5:30 p.m.	Reception	Somerset
5:30 – 8:30 p.m.	"Ethics in Action" – 3 CE Daniel J. Candura, CFP®, Candura Group, LLC, Braintree, MA	Somerset

Friday, November 9

7:30 – 8:00 a.m.	Check-In/Continental Breakfast/Exhibits	Grand Salon
8:00 – 8:30 a.m.	Welcome & Announcements	Grand Salon
8:30 – 9:20 a.m.	General Session/Opening Keynote "Systemizing Client Withdrawals: Strategy and Implementation" – 1 CE Ross Levin, CFP®, founding principal of Accredited Investors, Inc.	Grand Salon
9:20 – 9:40 a.m.	Break/Exhibits and Networking	Grand Salon
9:40 – 10:30 a.m.	Concurrent Sessions "Unlocking Social Security" – 1 CE Ryan Bostwick, CIMA®, CPC®, Regional Vice President Mutual Funds, Transamerica Capital, Inc. "Moving Into the Medicare System" – 1 CE Jan Liesse, Individual Health Consultant, Associated Financial Group, LLC "Estate Planning for Non-Traditional Families" – 1 CE Charles Stansberry, Jr. ("Chuck"), Attorney at Law, Schober, Schober & Mitchell, S.C.	Grand Ballroom South Grand Ballroom Center Grand Ballroom North
10:30 – 10:50 a.m.	Break/Exhibits and Networking	Grand Salon
10:50 – 11:40 a.m.	Concurrent Sessions "Unlocking Social Security" – 1 CE Ryan Bostwick, CIMA®, CPC®, Regional Vice President Mutual Funds, Transamerica Capital, Inc. "Moving Into the Medicare System" – 1 CE Jan Liesse, Individual Health Consultant, Associated Financial Group, LLC "Increase Your iPad IQ" Dennis Weishan, Senior Vice President, Senior Technology Consultant, Robert W. Baird	Grand Ballroom South Grand Ballroom Center Grand Ballroom North
11:40 – 12:00 p.m.	Break/Exhibits and Networking	Grand Salon

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12:00 – 1:40 p.m.	Lunch Session "Intellectual Property Power: The Growing Importance of Intangible" Cecil Martin, NCSA Athletic Recruiting and Board Member, UW Alumni Association	Grand Salon
1:40 p.m. – 2:00 p.m.	Break/Exhibits and Networking	Grand Salon
2:00 p.m. – 2:50 p.m.	Concurrent Sessions "Estate Planning for the Second Marriage" – 1 CE Carl D. Holborn, Attorney at Law, O'Neil, Cannon, Hollman, DeJong & Laing, S.C. "Income Tax Strategies for 2012 and 2013" – 1 CE Patrick A. Wirth, CPA, CVA, Tax Partner, Chortek & Gottschalk, LLP "Increase Your iPad IQ" Dennis Weishan, Senior Vice President, Senior Technology Consultant, Robert W. Baird	Grand Ballroom South Grand Ballroom Center Grand Ballroom North
2:50 p.m. – 3:05 p.m.	Break/Exhibits and Networking	Grand Salon
3:05 p.m. – 3:55 p.m.	General Session/Closing Keynote "Implementing the Wealth Management Index" – 2 CE Ross Levin, CFP®, founding principal of Accredited Investors, Inc.	Grand Salon
3:55 p.m. – 4:10 p.m.	Break/Wrap-Up/Door Prizes	Grand Salon
4:10 p.m. – 5:00 p.m.	Ross Levin, continued	Grand Salon
5:00 p.m.	Adjourn	Grand Salon