FINANCIAL PLANNING ASSOCIATION

SPOKANE

2022 Annual Conference

Date: October 20th, 2022

Time: 8:00 AM - 5:00 PM

Location: The Centennial Hotel

CFP CE: 6 Hours (including 2 hours ethics)

Speaker Line Up

Meghaan Lurtz, Ph.D., FBS™

Presentation: Upping Your Question Game: 25 Questions for Better Client Connections Throughout The Financial Planning Engagement - 1 Hour CE

Bio: Meghaan Lurtz, Ph.D., FBS™ is a Professor of Practice at Kansas State University where she teaches courses for the Advanced Financial Planning Certificate Program, a lecturer at Columbia University where she teaches Financial Psychology, and an on-staff writer and researcher of financial psychology at Kitces.com.

Steven Jarvis, CPA, MBA

Presentation: Mistakes you are making on tax planning, and what to do about them - 2 Hour CE

Bio: Steven Jarvis, CPA, MBA is nationally recognized for his work with Financial Advisors and their clients. In addition to over 10 years of technical experience, Steven also spent 3 years as an adjunct professor at Whitworth University and has extensive experience presenting on technical topics. This combination of experiences makes Steven uniquely qualified to deliver an engaging presentation that prioritizes action over pontificating.

Mark Seaman, CFA®

Presentation: Market Update and Opportunities - 1 Hour CE

Bio: Mark Seaman is an equity investment director at Capital Group. He has 28 years of investment industry experience and has been with Capital Group for 16 years. Earlier in his career at Capital, Mark managed the Advisory Resources Group interacting with research analysts and broker dealers. Prior to joining Capital, he was director of mutual fund research, director of alternative investments and director of non-proprietary fund distribution at Legg Mason Wood Walker. He holds a bachelor's degree in finance from the University of Maryland. He also holds the Chartered Financial Analyst® designation and is a member of the Baltimore Security Analysts Society. Mark is based in Washington, D.C.

Mike McGlothlin, ChFC®, CLU®, CFP®, LUTCF®

Presentation: Six Accelerants to a High Performing Practice

Bio: Mike McGlothlin, ChFC®, CLU®, CFP®, LUTCF® is an author, industry-renowned speaker and expert in growth strategies for financial professionals of all levels and business models. As Executive Vice President of Retirement for Ash Brokerage, he leads 65 direct reports who have grown a business line 300% in the last 6 years and now is one of the largest wholesaling teams in the Brokerage General Agency space. As a professional guide he can help any financial professional looking to create exponential revenue growth, find new clients, and remain relevant in the greatest shift to retirement by incorporating his simple methodologies and proven models.

Darin Shebesta, CFP®

Presentation: CFP Ethics - 2 Hour Ethics CE

Bio: Darin Shebesta is a Certified Financial Planner® Professional and Accredited Investment Fiduciary with Jackson/Roskelley Wealth Advisors, Inc. in Scottsdale, Arizona. He has been in the wealth advisory profession for over 15 years. Darin was selected as a Top 40 Under 40 Advisor in 2016 by InvestmentNews and has served as President of the Financial Planning Association of Greater Phoenix.