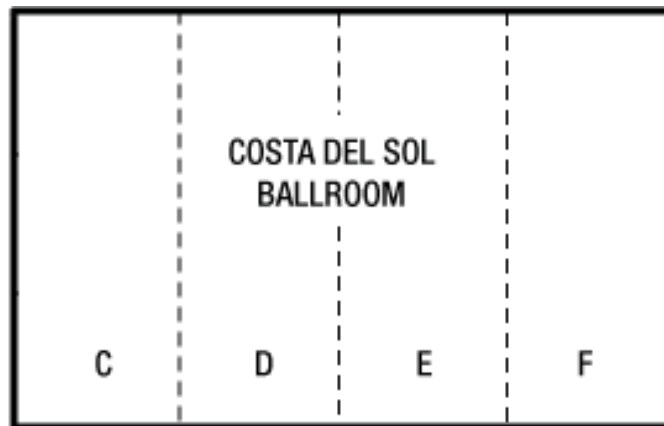


Thursday, August 2, 2012 – Subject to Change

8:00 – 8:25 am	Registration & Morning Coffee. Get reacquainted with colleagues you haven't seen all year	
8:30 – 9:40 am	Session 1 – General Session (Salons C & D) Can We Get Through This Mess: Economic Outlook Michael Lewitt, JD, LLM Cumberland Advisors	
9:45 – 10:00 am	Morning Break with Sponsors & Exhibitors	
10:00 – 10:50 am	Session 2 – General Session (Salons C & D) Active Share and High Conviction Investing Wayne G. LeSage, Jr. CFA, CFP® DundeeWealth US, LP	
11:00 – 11:50 am	Session 3 – General Session (Salons C & D) Effectively Working with Widows – Part 1 Kathleen M. Rehl, PhD, CFP® Rehl Financial Advisors	
12:00 - 12:45 pm	Luncheon with Our Chapter Partners and Colleagues (Salon E)	
1:00 – 1:50 pm	Session 4 – General Session (Salons C & D) Effectively Working with Widows – Part 2 Kathleen M. Rehl, PhD, CFP® Rehl Financial Advisors	
2:00 – 2:50 pm	Session 5A – Salon C Harp 2.0 and Beyond Kenneth Schiff OJ Mortgage Co., Inc.	Session 5B – Salon D Collaboration in Transition, It Could Be Your Lifeline Kathleen Richardson-Mauro, CFP®, CBI, CM&AA ROCG Tampa Bay
2:50 – 3:00 pm	Afternoon Break with Our Chapter Partners & Exhibitors	
3:00 – 3:50 pm	Session 6A - Breakout Real Estate, LLCs & Private Mortgages Truly Diversifying Your Retirement Portfolio Scott Maurer, JD Advanta IRA	Session 6B- Breakout Filling the Unrecognized Void Between Medicare and Out of Pocket Expenses Herb Green The Compass Agency USA
4:00 – 4:50 pm	Session 7 – General Session (Salons C & D) Rethinking Your Cash Flow Reserve Strategy John Salter, PhD, CFP®, AIFA, VITA Texas Tech University	
5:00 – 6:00 pm	President's Reception: Rush Hour Avoidance	

Friday, August 3, 2012- Subject to Change			
8:15 – 8:25 am	Registration & Morning Coffee. Get reacquainted with colleagues you haven't seen all year		
8:30– 9:45 am	<p>Session 8 – General Session (Salons C & D)</p> <p>Transition, Exiting or Merging: It's About Choices</p> <p>James J. Eccleston, JD Eccleston Law Offices</p> <p>Mitchell H. Vigeveno Turning Point</p>		
9:45 – 10:00 am	Morning Break with Sponsors		
10:00– 10:50 am	<p>Session 9 – General Session (Salons C & D)</p> <p>Staying Up to Speed on Medicare and ACA</p> <p>Linda Chamberlain, JD Shannon Martin, MSW, CMC</p>		
11:00 – 11:50 AM	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%; text-align: center;"> <p>Session 10 A – Salon C</p> <p>The Private Professional Fiduciary and Advisors</p> <p>Darby Jones, JD Professional Fiduciary Services, LLC</p> </td> <td style="width: 50%; text-align: center;"> <p>Session 10 B– Salon D</p> <p>Even the Rich are Being Foreclosed</p> <p>Jo Ann Koontz, JD, CPA Koontz and Associates, PL</p> </td> </tr> </table>	<p>Session 10 A – Salon C</p> <p>The Private Professional Fiduciary and Advisors</p> <p>Darby Jones, JD Professional Fiduciary Services, LLC</p>	<p>Session 10 B– Salon D</p> <p>Even the Rich are Being Foreclosed</p> <p>Jo Ann Koontz, JD, CPA Koontz and Associates, PL</p>
<p>Session 10 A – Salon C</p> <p>The Private Professional Fiduciary and Advisors</p> <p>Darby Jones, JD Professional Fiduciary Services, LLC</p>	<p>Session 10 B– Salon D</p> <p>Even the Rich are Being Foreclosed</p> <p>Jo Ann Koontz, JD, CPA Koontz and Associates, PL</p>		
12:00 – 12:45 am	Luncheon with our Sponsors and Colleagues (Salon E)		
1:00 – 3:50 pm	<p>Session 11 – General Session (Salons C & D)</p> <p>Safeguarding the 50+ and Above Market Senior Suitability</p> <p><i>(3-hour course)</i></p>		
4:00 pm	Symposium Concludes – Drive Home Safely		



PREFUNCTION SPACE