Personal Financial Planning Conference

October 19, 2016

Event Code: 13050, LS13050

GSCPA Learning Center

Atlanta, Georgia

The Georgia Society *of* CPAs

The Georgia Society *of* CPAs
Six Concourse Parkway
Suite 800
Atlanta, GA 30328

Personal Financial
Planning Conference

Nonprofit Organization
U.S. Postage
PAID
Atlanta, Georgia
Permit No. 1366

Personal Financial Planning Conference

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GSCPA Learning Center | Atlanta, Georgia | CPE Credit: 8 hours

Your clients look to you for guidance and sound advice in their journey to financial well-being. The 2016 Personal Financial Planning Conference will review investment tools and how to advise millennials, as well as investments related to retirement, lifestyle target date funds, and auto deferrals. A two part series on life insurance planning will provide an overview on tools and products to tax planning techniques to leveraging older policies. Discuss the Social Security component of the Bipartisan Budget Act.

Who Should Attend: CPAs, CFOs, investment advisors, controllers, and finance managers

Facility

The Georgia Society of CPAs Learning Center

Six Concourse Parkway, Suite 800, Atlanta, Georgia 30328 | 404-231-8676 | 800-330-8889

Directions: www.gscpa.org/content/ContinuingEducation/travelinfo.aspx

Hotel

The Westin - Perimeter North

Seven Concourse Parkway NW, Atlanta, Georgia 30328 | 770-280-9860 | http://bit.ly/WestinAtlantaGSCPA

LIVE STREAM ATTENDANCE

Event Code: LS13050 | CPE Credit: 8 hours

Live stream allows you to attend the conference from your home or office. You view the sessions in real time as part of the audience and have interaction with other attendees via chat areas. Live streamed sessions are indicated with this symbol:

For more information or to register, visit www.gscpa.org or call 404-504-2985 or 800-330-8889, Opt. 3.

Special Thanks to Contributing Members

Cromwell Baun, UBS Wealth Management, Atlanta, Georgia

Bryce Nations, Frazier & Deeter, Atlanta, Georgia

Doug Neal, Windham Brannon, Atlanta, Georgia

Program Schedule

7 - 8 a.m.
Registration and Continental Breakfast

8 - 8:05 a.m.
Welcome and Announcements

8:05 - 9:20 a.m.
A - Estate Planning for 2016 and Beyond
O. Lee Wiseley Jr., J.D., LL.M., Columbus, Ga.
Embark on a general survey of estate planning terrain including a review of existing tax exclusion structure, tax rates, and how to utilize the exclusions to the advantage of clients. Discuss estate planning strategies, old and new, that the advisor is likely to encounter, and how to spot problem areas and opportunities for improvement that benefit the client. Review the enhanced importance of income tax planning, and give consideration of the basis reporting regime and the opportunities presented by estate tax exclusion portability and the associated return preparation obligations.

9:20 - 9:30 a.m.
Break

9:30 - 10:20 a.m.
B - Social Security
Desmond Thornton
Social Security Administration, Atlanta, Ga.
A top concern of your baby boomer clients is outliving their retirement savings, making the decision of when to collect Social Security retirement benefits incredibly important. While many clients are hardwired to believe they should begin collecting benefits as early as possible, there are many other options to consider. Social Security rules are complicated; by understanding the basics, you can help your clients maximize their Social Security retirement benefits while boosting loyalty and increasing referrals. Odds are high that you are one of the 155 million people working and paying Social Security taxes. Odds are low that you know EXACTLY how Social Security benefits impact your financial future and that of your clients. Learn the ins and outs of Social Security from an agency insider.

10:20 - 10:25 a.m.
Break

10:25 - 11:15 a.m.
C - Basis Reporting for Estates
James W. Hass, Jr. J.D.
Lefkoff, Duncan, Grimes, McSwain & Hass, PC, Atlanta, Ga.
Receive guidance on the new estate basis consistency reporting requirements. Explanation will focus on the latest IRS pronouncements regarding coordinating basis reporting with the filing of the estate tax return and valuations reported on new Form 8971.

11:15 a.m. - 12 p.m.
Lunch

12 - 12:50 p.m.
D - Risks to the Economic Outlook
Tom Cunningham
Metro Atlanta Chamber of Commerce, Atlanta, Ga.
A detailed discussion of the metro- and macro-economic outlook, associated risks, and the various sectors of the economy. Pricing and inflation issues for the economy and the dynamics and measurement issues of the U.S. labor market will also be discussed.

12:50 - 1 p.m.
Break

1-1:50 p.m.
Cybersecurity for Your Clients
Cody Hilbun, AAMS®, WMS®, Don Milich, and Max Dean, AAMS®
Raymond James & Associates, Atlanta, Ga.
Mark Ray, PwC Atlanta, Ga.
Receive an overview of the industry including leading public companies providing solutions, how the industry has become segmented, and the growth potential it represents. We will highlight the most known attacks and discuss how the attackers have adapted their techniques. In addition, we will have a list of suggestions for CPAs to help prevent their practice from having a breach of information.

1:50 - 2 p.m.
Break

2 - 2:50 p.m.
Life Insurance 101
Brent Eden, J.D., and Walt Helms, CFP®
Nease, Lagana, Eden & Culley, Inc., Atlanta, Ga.
Review life insurance industry trends, including discussion from both the carrier and policyowner perspectives. Additionally, a history of product innovations will be presented with a discussion of the products currently available and general practical uses of each type.

2:50 - 3 p.m.
Break

3 - 4:15 p.m.
Ways to Bring Value to Your Clients with Life Insurance
Brent Eden, J.D., and Walt Helms, CFP®
Nease, Lagana, Eden & Culley, Inc., Atlanta, Ga.
Address practical applications, misconceptions and opportunities allowing you to better advise your clients on life insurance issues. Case studies highlight both personal and business uses while specific topics discuss enhancing your ability to spot potential issues and opportunities for your clients.

REGISTRATION

Event Code: 13050

Name	MI	Last	Member #

Company/Firm Name

Address	City	State	Zip

Phone	Fax	Email

Registration Confirmation: ❑ Mail ***OR*** ❑ Email **Check here if registration includes a change of address:** ❑

PRICING INFORMATION

	Members	Nonmembers	LIVE STREAM Members	LIVE STREAM Nonmembers
Early Registration Fee by September 28	❑ $255	❑ $355	❑ $255	❑ $355
Standard Registration Fee	❑ $315	❑ $415	❑ $315	❑ $415
Late Registration Fee after October 14	❑ $355	❑ $455	❑ $355	❑ $455

Cancellation Policy: Cancellations/Transfers made up to three weeks before the seminar or conference will not incur an administration fee. Cancellations/Transfers made during the Standard Fee time frame are subject to a $50 administration fee. Cancellations/Transfers made within three business days are subject to a $100 administration fee for members; $150 for nonmembers. *Cancellations/No shows on the date of the event forfeit the entire registration fee. No refunds or transfers of course fee will be made after the date of the event.*

MATERIALS

Choose how you wish to receive conference materials

- ❑ Download eMaterials **No printed materials provided**
- ❑ Printed Materials **Will receive printed materials**

ITEMS TO NOTE

If you have a specific dietary or other need, please contact the CPE Department at least one week prior to the conference at 404-504-2985 or 800-330-8889, Opt. 3.

If you have special needs under the Americans with Disabilities Act, please attach a written description or call 404-504-2985 or 800-330-8889, Opt. 3.

PAYMENT INFORMATION

- ❑ Use Money on Account
- ❑ Check for $____________ made payable to The Georgia Society of CPAs
- ❑ Amount to charge credit card $____________
- ❑ Personal Card *OR* ❑ Company Card
- ❑ Discover ❑ MasterCard ❑ AmEx ❑ Visa

Card Number	Expiration Date

Name as it appears on card

Signature

REGISTER TODAY!

CALL GSCPA CPE Department at 404-504-2985 or 800-330-8889, Opt. 3 to place a credit card order

FAX a completed registration form with credit card information to GSCPA at 404-237-1291

INTERNET registration available at www.gscpa.org

MAIL your completed registration with credit card information or check made payable to The Georgia Society of CPAs to:

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