

Partner Roundtable Sessions - 1-2pm

ORGANIZED IN THE SPIRIT OF SMALL GROUP LEARNING AND INFORMAL CONVERSATION, EACH ROUNDTABLE IS HOSTED BY AN FPA OF MIAMI PARTNER WHO WILL INITIATE A LIVELY EXCHANGE ABOUT A TOPIC OR INDUSTRY TREND.

ROUNDTABLES WILL COMPRISE OF 3*20 MINUTE SESSIONS:

ROUNDTABLE #1 - CORAL GABLES TRUST - RICHARD DENAPOLI
TOPIC "THE BENEFITS OF A TRUST FOR YOUR CLIENTS"

ROUNDTABLE #2 - PENSION SERVICES INC. - ROBERT PENAFIEL
TOPIC "MAXIMIZING ASSETS UNDER MANAGEMENT THROUGH CUSTOM RETIREMENT PLANS"

ROUNDTABLE #3 - BANNA FAKHOURY MIAMI HOMES - BANNA FAKHOURY
TOPIC "SOUTH FLORIDA: STATE OF THE REAL ESTATE MARKET "

ROUNDTABLE #4 - BITGO - NATE LARRIVEE
TOPIC "INTEGRATING DIGITAL ASSETS WITH BITGO'S PLATFORM FOR WEALTH MANAGEMENT"

ROUNDTABLE #5 - BROWN ADVISORY - DANIELA LAMPRU
TOPIC "DON'T CALL IT A COMEBACK. WE WERE NEVER GONE. WHY ACTIVE MANAGEMENT IN FIXED INCOME AND WHY NOW."

ROUNDTABLE #6 - FEDERATED SECURITIES CORP. - KIP ANDERSON / PETER SMITH
TOPIC "TIME TO UPDATE YOUR PASSPORT-OPPORTUNITIES IN THE INTERNATIONAL MARKETS"

ROUNDTABLE #7 - HINES SECURITIES - JONATHAN BRANHAM
TOPIC "TAXES, TIMING AND GROWTH, WHY REAL-ESTATE MAKES SENSE AS A PORTFOLIO POSITION."

ROUNDTABLE #8 - NATIONWIDE - MITCH ANGLIN & DELANEY FONTANA
TOPIC "PLANNING FOR THE COST OF HEALTH CARE : NATIONWIDE FINANCIAL'S CLIENT-FACING COST ASSESSMENT TOOL"

ROUNDTABLE #9 - OSTERWEIS CAPITAL MANAGEMENT - BRYAN WONG/TYLER VOSS
TOPIC "HIDDEN GEMS: THE POWER OF SMALL CAP INVESTING"

ROUNDTABLE #10 - T ROWE PRICE - WAYNE EWAN
TOPIC "ACTIVE ETFs AND TAX-LOSS HARVESTING"

ROUNDTABLE #11 - VANGUARD FINANCIAL ADVISOR SERVICES - CHAD GUSTUS
TOPIC "EXPLORE IMPROVING AFTER TAX RETURNS WITH VANGUARD'S PERSONALIZED INDEXING"

ROUNDTABLE #12 - FIRST TRUST PORTFOLIOS - JAMES MOLINARI
TOPIC "HOW WE ASSESS A COMPANY'S ABILITY TO GENERATE CASH FLOW AND ITS CURRENT VALUATION RELATIVE TO INTRINSIC VALUE"

PLATINUM PARTNERS



GOLD PARTNERS



Own your tomorrow.



Mutual of Omaha



Sit Investment Associates
Sit Mutual Funds



POST-SYMPOSIUM NETWORKING PARTNER



Built Differently to Build Differently

SILVER PARTNERS

