ROUNDTABLES

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:

CORAL GABLES TRUST

ROUNDTABLE #1
Topic "The Benefits of a Trust for Your Clients"
John Harris & Michael Unger

PSI PENSION SERVICES INC — DESIGNING RETIREMENT PLANS FOR MAXIMIZED CONTRIBUTIONS

ROUNDTABLE #2
Topic "Maximizing assets under management through customized qualified retirement plan such as cash balance and profit sharing plans"
Robert Penafiel

JOHNSON ASSET MANAGEMENT

ROUNDTABLE #3
Topic "Quality security selection: an evergreen approach to risk managements"
Charles E. Rinehart & Michael Murphy

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polen capital

ROUNDTABLE #4
Topic "AI Implementation Ideas for Your Practice"
Greg Moro & Zander Valentini

1847Financial

ROUNDTABLE #5
Topic "Corporate Tax Mitigation Strategies"
Anthony D'Angelo & Peter Dolgoff

AbsoluteCapital — smart solutions for serious money

ROUNDTABLE #6
Topic "Why Wait for the Rollover? Manage Your Client's 401k/403b/457 Today!"
Rick Garcia

BLUE IVY | COACHING

ROUNDTABLE #7
Topic "Guiding the Next Generation: Preparing Tomorrow's Leaders for College, Career and Legacy"
Marcus DeWitt & Olivia Leaman

BRIDGE INVEST

ROUNDTABLE #8
Topic "Navigating Uncertainty: How Senior-Secured CRE Credit Anchors Client Portfolios"
Ian Glaser

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ROUNDTABLE #9
Topic " Fixed Income Perspectives: Repositioning for the road ahead."
Marek Blaskovic

Eaton Vance

ROUNDTABLE #10
Topic "Mitigating capital gains realization: it's not what you make, its what you keep."
Ian McGinn

ROUNDTABLES

Federated Hermes

ROUNDTABLE #11
Topic "Trends in Portfolio Construction"
Kip Anderson

GRAYSCALE

ROUNDTABLE #12
Topic "Beyond Bitcoin – Ethereum and the smart contract platforms"
Michael Zhao & Tracy Wright

HARDING LOEVNER

ROUNDTABLE #13
Topic "Ex US Marks the Spot: Mapping Opportunities in International Equities."
Apurva Schwartz & Katie George

Hines GLOBAL INCOME TRUST

ROUNDTABLE #14
Topic "Why Commercial Real Estate makes sense today for client Portfolios"
Travis Conlan

MLG CAPITAL

ROUNDTABLE #15
Topic "Tax Efficiencies of Real Estate Private Equity"
Conor Donohue

OSTERWEIS CAPITAL MANAGEMENT

ROUNDTABLE #16
Topic "A New World in Fixed Income: Higher Quality High Yield"
Tyler Voss

PACIFIC LIFE

ROUNDTABLE #17
Topic "Positioning Advisory Annuities for Growth at Fee-Only Firms"
Orian Williams

SEAFARER

ROUNDTABLE #18
Topic "Opportunities and Risks in the Emerging Market"
Daniel Duncan

TOEWS asset management

ROUNDTABLE #19
Topic "The Behavioral Portfolio: Managing Portfolios and Investor Behavior in a Complex Economy"
Eben Burr

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ROUNDTABLE #20
Topic "The value of your time: client segmentation, service experience, and fee schedule"
Jeffrey Bryan

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