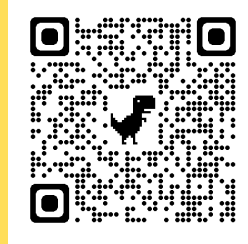




20TH ANNUAL SYMPOSIUM
NOVEMBER 18, 2025

SHARE VIA SOCIAL MEDIA



FPA of Miami Symposium

Doors open at 8:00 AM
November 18, 2025

Rusty Pelican
3201 Rickenbacker Cwy
Key Biscayne, FL 33149



Program Flow

BREAKFAST/NETWORKING WITH SPONSORS | 8:00 - 8:45 AM

OPENING REMARKS | 8:45 - 9:05 AM

KEYNOTE #1 | 9:05 AM

TOPIC - "ECONOMIC UPDATE"

CHARLES E. RINEHART, CFA, CAIA

CHIEF INVESTMENT OFFICER, PRINCIPAL - ***JOHNSON ASSET MANAGEMENT***



KEYNOTE #2 | 10:05 AM

TOPIC - INVESTMENT PANEL

DAVE BREAZZANO

HEAD OF CREDIT - ***POLEN CAPITAL***



SAMUEL MOORE

ASSOCIATE VICE PRESIDENT - ***VEST CAPITAL***



APURVA SCHWARTZ

PORTFOLIO SPECIALIST - ***HARDING LOEVNER***



JOSE DIEGO GONZALEZ, CFP®, CIMA®, CCFC

CAMERON DOWNING, INC. - PANEL MODERATOR



CONCURRENT SESSION #1 | 11:05 AM

TOPIC - THEY DID WHAT?! HOW 501(C)(3) ORGANIZATIONS GET INTO TROUBLE - AND HOW TO GET THEM OUT

HEIDI SUAREZ, CPA

DIRECTOR, ESTATE & TRUST - ***KAUFMAN ROSSIN***



CONCURRENT SESSION #2 | 11:05 AM

TOPIC - ESTATE PLANNING PANEL

ORIAN WILLIAMS

MANAGING DIRECTOR- ADVISORY ANNUITIES
SOUTHEAST REGION - ***PACIFIC LIFE***



JESSICA UZZELL, JD

DIRECTOR OF PHILANTHROPIC
STRATEGY - ***THE MIAMI FOUNDATION***



PHIL PARET, CFP®, CHFC®, CVGA®, CEPA®, CM&AA®, CAIA®, CLU®, AEP®

WEALTH & BUSINESS MANAGER - ***MARINER WEALTH ADVISORS***
PANEL MODERATOR



LUNCH - NETWORKING | 12:00 - 1:00 PM

PARTNER LED ROUND TABLE DISCUSSIONS | 1:00-2:00 PM

TOPIC - VARIOUS (SEE SEPARATE SCHEDULE)

KEYNOTE #3 | 2:10 PM

TOPIC - "NEXT ERA OF ETFs"



NICK HARGREAVES

ASSISTANT VICE PRESIDENT, ETF SALES **CAPITAL GROUP**

KEYNOTE #4 | 3:10 PM

TOPIC - WHAT'S CHANGED, WHAT'S NEXT: TAX PLANNING AFTER THE ONE BIG BEAUTIFUL BILL

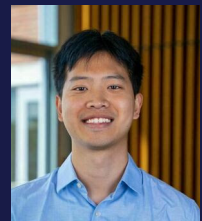


JOSE C. FERNANDEZ

PRINCIPAL, TAX SERVICES **BDO USA**

KEYNOTE #5 | 4:10 PM

TOPIC - INVESTING IN THE CRYPTO ASSET CLASS



MICHAEL ZHAO

RESEARCH - **GRAYSCALE INVESTMENTS**

CLOSING REMARKS & RAFFLES | 5:20 - 5:30 PM

NETWORKING RECEPTION | 5:30 - 7:30 PM

REGISTER @ <https://fpamiami.com/Symposium>

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6 hours of IAR CE credit - Products and Practice

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