FPA

FINANCIAL PLANNING ASSOCIATION

MIAMI



THE 21ST ANNUAL

FPA OF MIAMI SYMPOSIUM

Ideas. **Strategy**. Connection.

DATE

November 12, 2026

TIME

8:00 AM – 7:30 PM

5:30 – 7:30 PM
networking & cocktails

LOCATION

Rusty Pelican
3201 Rickenbacker Causeway
Key Biscayne, FL 33149

CE CREDITS

Now approved for six CE credits each from the Florida Bar, Florida insurance, and IAR, plus **three approved CFP® CE credits** with three more pending.



ARRIVE. CHECK IN. CONNECT.

CONTINENTAL BREAKFAST + MORNING NETWORKING

CHECK-IN BEGINS
8:00 AM

Morning: Markets, Leadership & the Advisor of Tomorrow

The day opens with the defining investment themes shaping client portfolios, widens into the macro environment, and then turns to the business of delivering exceptional advice.

9:00 AM

The AI Arms Race: Global Investment, Infrastructure and the Battle for Economic Leadership

INVESTMENT PANEL | **1 HR CE**

AI is driving one of the largest capital-investment cycles in decades, with implications far beyond technology stocks. This interactive panel examines the race to build AI infrastructure, how the U.S., China and international markets are approaching it differently, and what the scale of spending could mean for industries, economies and portfolio allocation.

Daniel Santiago | State Street Investment Management
Apurva Schwartz | Harding Loevner
Nicholas Borst | Seafarer Capital Partners

10:00 AM

The Economy at an Inflection Point: Markets, the Fed and What Comes Next

ECONOMIC KEYNOTE | **1 HR CE**

Anthony Saglimbene brings the perspective of Ameriprise Financial's Chief Market Strategist to the forces shaping growth, inflation, the Fed, interest rates, and markets heading into 2027. A member of the firm's Global Asset Allocation Committee, whose market commentary is regularly featured by major financial media, he connects the macro outlook to the risks and opportunities advisors are navigating in client portfolios.

Anthony M. Saglimbene | Vice President & Chief Market Strategist, Ameriprise Financial

11:00 AM

Leading a High-Performing Advisory Practice

PRACTICE MANAGEMENT | **1 HR CE**

High-performing advisors increasingly need to lead as CEOs, not just practitioners. Wassan Kasey brings 22 years of industry experience and Capital Group's PracticeLab research, along with hands-on consulting experience with leading RIAs, to an interactive discussion of leadership, team structure, scalable growth and a differentiated client experience.

Wassan Kasey | Senior Vice President, Capital Group



WATERFRONT LUNCH.

PARTNER ACCESS. ACTIONABLE PLANNING.

The afternoon shifts from ideas to application.

Waterfront Lunch. Partner Access. Actionable Planning.

The afternoon shifts from ideas to application, beginning with the Vista Terrace experience and smaller partner conversations before moving into planning strategies advisors can take back to clients.

12:00 PM

Lunch on the Vista Terrace

NETWORKING

Take in the waterfront views of Biscayne Bay while connecting with fellow financial professionals, speakers and FPA Miami partners at one of South Florida's signature waterfront venues.

1:00 PM

Partner Roundtable Experience: Connect. Learn. Rotate.

PARTNER EXPERIENCE

Move through intimate, approximately 20-minute conversations hosted by FPA Miami partners and sponsors. Designed to complement the traditional exhibit experience, these interactive roundtables create space for more personal conversations, deeper engagement, and direct access to ideas, resources and solutions relevant to today's planning professionals.

2:00 PM

Beyond the 401(k): Advanced Retirement Plan Strategies for Business Owners

ADVANCED PLANNING | 1 HR CE

Learn how to spot business-owner clients who may be leaving meaningful tax and retirement opportunities on the table. Robert Penafiel brings 30+ years of specialized experience designing 401(k), profit-sharing, cross-tested, cash balance, defined benefit, and combination plans. Interactive cases focus on what advisors should look for, what to ask and how customized designs and tax credits can improve client outcomes.

Robert Penafiel | President, Pension Services, Inc.

3:00 PM

South Florida Real Estate: Data, Demographics & Florida's Changing Property Tax Landscape

SPECIAL SESSION | 1 HR CE

Ana Bozovic brings a mathematics-and-physics background to a data-first look at South Florida pricing, inventory, wealth migration, condos, affordability and property-tax policy. A four-term Miami Association of Realtors Governor and 2023 Market Insight & Leadership Award recipient, featured in the NYT, BBC, Time & Miami Herald.

Ana Bozovic | Founder, Analytics Miami.

THE FPA MIAMI PLANNING LAB

4:00 PM – 5:00 PM

CFP® CE
1 HOUR

COLLABORATIVE PLANNING IN ACTION

A Multidisciplinary Approach to Complex Clients

REAL CLIENT SCENARIOS. DIVERSE PERSPECTIVES. PRACTICAL SOLUTIONS.

Join a dynamic, interdisciplinary discussion as experienced professionals work through a complex client case in real time. Gain valuable insights on how to align financial, legal and tax strategies, navigate tradeoffs and build more coordinated, comprehensive plans for high-net-worth clients.

1 CLIENT FACTS
A realistic situation

2 YOU DECIDE
Audience polling & discussion

3 EXPERT REACTION
Panel analysis and perspective

4 WHAT'S NEXT?
New facts. New decisions.

5 STRONGER OUTCOMES
Key takeaways for your clients

THE CASE

A Complex High-Net-Worth Client Situation

An affluent family with multigenerational wealth faces key decisions around investment, tax, estate, business transition and family dynamics. New developments will challenge the panel to reassess earlier recommendations and explore different approaches.

THE CHALLENGE: **Coordination, sequencing + tradeoffs**

PANELISTS:

Sam Jurrens, CFA, CFP®
Co-Founder & CEO
Helmsted

Arthur "Arty" Palermo Jr., CPA
Founder/Partner
Palermo, Landsman & Ross, P.A.

Ryan J. Coyle
Partner
Bilzin Sumberg



The formal program ends with mission, recognition and community - then gives attendees a reason to stay, connect and enjoy the waterfront as Miami rush hour begins to ease.

5:00 PM

A Mission Beyond the Profession

VETERANS DAY RECOGNITION

A special presentation from Wounded Warrior Project honoring service, sacrifice, resilience and purpose beyond the profession.

Featuring: Tonya Oxendine
Wounded Warrior Project | Warriors Speak

5:30 PM – 7:30 PM

Sunset Networking & Happy Hour

WATERFRONT NETWORKING

Network. Connect. Unwind.

Follow the FPA of Miami on LinkedIn

Stay up to date with the latest information on upcoming events, CLE opportunities, and more.

SCAN TO FOLLOW US ON LINKEDIN

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Their support strengthens our profession, our community and the experience we create together.

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