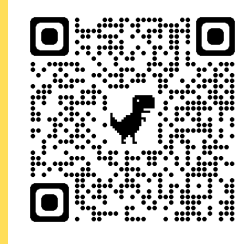




19TH ANNUAL SYMPOSIUM
OCTOBER 17, 2024

SHARE VIA SOCIAL MEDIA



FPA of Miami Symposium

Doors open at 8:00 AM
October 17, 2024

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 PANEL DISCUSSION"

AMY HAUTER

DIRECTOR OF
SUSTAINABLE FIXED
INCOME - **BROWN**
ADVISORY



JORDAN JACKSON

GLOBAL MARKET
STRATEGIST - **J.P. MORGAN**
ASSET MANAGEMENT



PETER SMITH

SENIOR VICE PRESIDENT,
INTERNATIONAL EQUITY
STRATEGIST - **FEDERATED**
HERMES



BRYAN WONG

VICE PRESIDENT &
PORTFOLIO
MANAGER -
OSTERWEIS CAPITAL
MANAGEMENT



WAYNE EWAN

VICE PRESIDENT -
T. ROWE PRICE
INVESTMENT SERVICES,
INC.
PANEL MODERATOR



KEYNOTE #2 | 10:05 AM

TOPIC - DIVORCE PANEL DISCUSSION

PHILIP HERZBERG

LEAD FINANCIAL
ADVISOR,
TEAM HEWINS, LLC



LAUREN GRONDSKI

LAW OFFICES OF LAUREN
GRONDSKI, P.A.



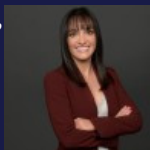
VICKY TOWNSEND

PRESIDENT -
DIVORCE RIGHT, INC



MARIA CASTILLO DOMINGUEZ,
MS, CFP®

VALORIA WEALTH MANAGEMENT,
LLC
PANEL MODERATOR



CONCURRENT SESSION #1 | 11:05 AM

TOPIC - FOUNDATION FOR FINANCIAL PLANNING - PRO BONO FINANCIAL PLANNING TRAINING COURSE

CHRISTIAN E.
URBINA, CFP®

PRESIDENT/CIO -
PROSPERITUS WEALTH
ADVISORS, LLC



MARIA CASTILLO
DOMINGUEZ, MS, CFP®

FOUNDER -
VALORIA WEALTH
MANAGEMENT, LLC



CARL M. CHRISTIE,
MBA, CFP®, CFS®

FLORIDA ATLANTIC
UNIVERSITY
PANEL MODERATOR



CONCURRENT SESSION #2 | 11:05 AM | IAR (PRODUCTS AND PRACTICE) - CE CREDIT

TOPIC - "PRACTICAL APPLICATIONS WORKING WITH ALLIED PROFESSIONALS" TAX/ACCOUNTING/ADVISOR PANEL

YOANDRY
DELGADO, CPA,
MST

PARTNER - **KSDT CPA**



PAUL A. GABRIELE,
CPA/ABV

TAX PARTNER -
EISNERAMPER



FRANKLIN GAY CFP®,
EA

WEALTH ADVISOR - **TOBIAS**
FINANCIAL ADVISORS



GLENN DOWNING, MBA, CFP®

CERTIFIED FINANCIAL
PLANNER, **CAMERON DOWNING**
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 - "GETTING TO YES QUICKER BY UNDERSTANDING THE PERSONALITY PARADOX "

ERIKA WASSERMAN

CERTIFIED FINANCIAL THERAPIST (CFT-1)



KEYNOTE #4 | 3:10 PM | IAR (PRODUCTS AND PRACTICE) - CE CREDIT

TOPIC - BUSINESS EXIT PLANNING

JOSH BLUM

CO-FOUNDER, PARTNER
INVOLVE + THRIVE



PHIL PARET, CFP®

WEALTH ADVISOR
IMPERIO WEALTH



KEYNOTE #5 | 4:10 PM

TOPIC - THE STATE OF THE REAL ESTATE MARKET

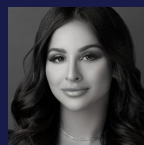
**JONATHAN
BRANHAM**

DIRECTOR - HINES
SECURITIES, INC



BANNA FAKHOURY

GLOBAL REAL ESTATE
ADVISOR ONE SOTHEBY'S
INTERNATIONAL REALTY



ARIELLA GUTMAN

PARTNER - HABER LAW



**ANTON TAVERAS,
CPRIA**

VICE PRESIDENT OF
PERSONAL RISK -
USI INSURANCE
SERVICES



KIMBERLY MAMARIL

VICE PRESIDENT | WEALTH
ADVOCATE FOR HNW &
UHNW CLIENTS, LAS OLAS
CAPITAL ADVISORS
PANEL MODERATOR



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

NETWORKING RECEPTION | 5:30 - 7:30 PM

CHARITY SPEAKER - NICKLAUS CHILDREN'S HOSPITAL FOUNDATION



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