



2021 FPA Virtual Spring Financial Forum **Wednesday, March 10 and Thursday, March 11** **Schedule of Events**

Wednesday, March 10

- 8:30 – 9:00 am **Virtual Networking: Coffee with Colleagues | Visit Exhibit Hall | Announcements**
- 2020 Board Acknowledgments
 - President’s Speech
 - Pro Bono, Membership, & Association Announcements
- 9:00 – 9:05 am **Welcome & Opening Remarks**
- 9:05 – 9:15 am **Sponsor Recognition & Introductions**
- 9:15 – 10:45 am **Opening Keynote: Behavior Gap**
Presented by Carl Richards, CFP®, Creator of the Sketch Guy column & Behavior Gap
- 10:45 – 11:00 am *Break & Visit with Exhibitors*
- 11:00 am – 12:00 pm **Keynote: Oregon Economic Forecast**
Presented by John Mitchell, Oregon Economist
- 12:00 – 1:00 pm *Visit with Exhibitors & Lunch/Catch up on Emails Break*
- 1:00 – 2:00 pm **Closing Keynote: Wealth Planning**
Presented by Katherine Roy, Managing Director, Chief Management Strategist & Head of Individual Retirement, J.P. Morgan Asset Management
- 2:00 – 2:15 pm **Day 1 Closing Remarks | Sponsor Raffles**

Thursday, March 11

- 8:30 – 9:00 am **Virtual Networking: Coffee with Attendees & Sponsors | Visit Exhibit Hall**
- 9:00 – 9:05 am **Welcome & Opening Remarks; Review of Schedule**
- 9:05 – 9:15 am **Sponsor Recognition & Introductions**
- 9:15 – 10:15 am **Opening Keynote**
- 10:15 – 10:30 am *Break & Networking with Exhibitors*
- 10:30 – 11:30 am **Keynote: Oregon-specific Financial Planning**
- 11:30 am – 12:30 pm *Networking with Exhibitors & Lunch/Catch up on Emails Break*
- 12:30 – 2:00 pm **Closing Keynote: Five Industry Trends Reshaping Financial Advice**
Presented by Michael E. Kitces MSFS, MTAX, CFP®, CLU, CHFC, RHU, REBC, CASL
- 2:00 pm **Final Closing Remarks | Sponsor Raffles**
- 2:00 pm **Networking Social Reception & Games (optional)**