



ONE  
CONNECTION™

*The premier community that  
develops and supports  
financial planning professionals*

## What's Going on with *Your* FPA of Maryland June 2014

### Our 2014 Partners

Baltimore Community  
Foundation

- Rebecca Rothey

Calvert Funds

- Tacy Roby

Charles Schwab Advisor  
Services

- Martin Bucko

- Ray Harris

Fidelity Investments

- Katherine Forester

Founders Financial

- Jim DeCarlo

Pessin Katz Law

- Kevin Bress

Revenue Shares

- David Cohen

The Johns Hopkins Carey  
Business School

- Pam Williams

The Kitces Report

- Michael Kitces

T. Rowe Price

- Barrett Wragg

Wilmington Trust Funds

## Fall Symposium Registration is Open for Members Only

Join us **September 11 & 12**  
for the inaugural  
Financial Planning Association  
of Maryland  
2-Day Symposium  
at Turf Valley Resort & Conference  
Center in Ellicott City, Maryland

**This event will SELL OUT!**

### KEYNOTE ADDRESS

***Strategic Power: Systematically Influencing People and  
Their Decisions***

Jeff Cochran, Master Facilitator from the Internationally  
Acclaimed Shapiro Negotiations Institute

### FEATURING

**Michael Kitces**, Director of Planning Research with Pinnacle  
Advisory Group

**Alan Levinson**, Chief Economist with T. Rowe Price

**Ben Lewis**, Director of Communications and Public Relations  
for Financial Planning Association

**Vince Lowry**, CEO of Revenue Shares

### PLUS

**Dan Candura** presents CFP® Ethics

- Joe Mondell



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## AND

**Jim DeCarlo**, of Founders Financial moderates a 90-Minute Practice Management Panel Featuring:  
**David Berman**, CFP®, CLU, CEO of Berman McAleer  
**Peter McGratty**, CFA, Vice President of Strategic Partnerships for Pinnacle Advisor Solutions  
**Chris Benson**, CPA/PFS, Second Generation "NexGen" Advisor with LK Benson & Company

## ALONG WITH

**Nicole Windsor**, Esq. from Bowie and Jensen Presents *Employment Law Updates*  
**Kevin Bress**, Esq. from Pessin Katz Law Presents *Federal and Maryland Estate Planning Updates*  
**Brad Breeding**, CFP® from LifeSite Logics Presents *The Retirement Living Landscape: What You Need to Know and Why*  
**Rebecca Rothery**, CFRE from the Baltimore Community Foundation Presents *Philanthropy: The Fast Paced Property Giving Game*  
**Calvert Funds** Presents *The Case for Investing in Water*  
**Wilmington Funds** Presents *Alternative Non-Traditional Investments*

## ACCOMODATIONS

Full Breakfast and Lunch Both Days  
Mid-Morning and Afternoon Snacks  
Overnight Accommodations Available at Discounted Rates  
Continuing Education Credits for CFP®, Insurance, CPA, CIMA®, and CPWA® for some sessions

## SIGN UP NOW!

Pre-sale tickets available to FPA Maryland Members  
**ONLY through Wednesday, July 2: \$295**  
**Member rate after July 2: \$349**  
**Non-Member rate: \$399**

Please click [here](#) to view the invitation and to register.

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Financial Planning Association of Maryland | PO Box 799 | Reisterstown | MD | 21136