



NORTHEASTERN NEW YORK CHAPTER

April 12, 2021

To: All attendees
From: FPA-NENY
Subject: 20th Annual FPA NENY Symposium - virtual style

Bad news: We had all hoped to return to our fabulous in-person events, obviously we can't do so this year.

Good news: Our Symposium **WILL proceed**, albeit virtually, on **Thursday, May 13, 2021**.

Those who bought a COMBO for the 2019/2020 season have already been contacted by Stephanie because they already have their Symposium ticket.

If you have NOT heard from me, please purchase your 5.13.2021 Symposium ticket [HERE](#).

HOW THIS WORKS for attendees:

1. After you buy your ticket, you will receive a link to a form to complete. Please complete the form ASAP.
2. The Zoom link and all materials will be emailed to you prior to the Symposium.
3. On May 13, 2021, we will go live at 7:30am, with each session beginning on the hour and lasting 50 minutes.
4. Questions during the presentations may be submitted using the CHAT function. Because of the time restraints, any questions that weren't answered will be forwarded to the speaker for response. This information will be compiled and distributed to attendees the following week.
5. Though the Zoom platform tracks attendance, each course will feature a unique code that you must record and remit to receive CE credit.
6. The day's schedule is below. During the lunch break, Zoom will remain open for anyone who wishes to chat with peers and Partners.

HOW THIS WORKS for OUR VALUED PARTNERS:

First and foremost - let's give a huge THANKS to our Partners - each and every partner renewed their partnership with our Chapter this year -- not one jumped ship during this pandemic, which is a HUGE vote of confidence for our Chapter. Thank you, thank you, thank you.

Naturally, our Board was truly concerned with and interested in providing value to our Partners during this year's virtual Symposium. To this end, our Partners will be submitting their pre-recorded promos which will be shared throughout the day and available after the event. Keeping with tradition, our Partners will also offer raffles for attendees, with recipients drawn at the end of the day. You'll also receive a newsletter with our Partner information. **As our Partners support us, let us support our Partners.**

[Partner Contact Information](#)

	The Day's Schedule - course descriptions are on our WEBSITE
Zoom opens at 7:30am	<i>Partners may (quickly) introduce their speaker.</i>
1: 8:00 - 8:50am	Power Brand , Sheridan Culhane, MFS
2: 9:00 - 9:50am	Positioning for the Next Economic Cycle , Brian Levitt, Invesco
3: 10:00 - 10:50am	Ongoing Soap Opera of Health Care Reform , Dr. Carolyn McClanahan, Life Planning Partners
4: 11:00 - 11:50am	Navigating the New Insurance World for Optimal Client Plans , Bob Vandy, AIB
LUNCH - Zoom remains open	
5: 1:00 - 1:50pm	Bridging the Relational Finance Gap: <i>How to be more productive and profitable while advising married clients with relationship challenges</i> , Dr. Travis Parry, Live Life on Purpose
6: 2:00 - 2:50pm	Responsible Investing is Good Business , Lenore Reiner, Eaton Vance
7: 3:00 -- 3:50pm	Planning Options Under the SECURE Act , Lou Pierro, Pierro, Connor & Strauss
RAFFLES	

Please feel free to contact Stephanie Cogan at info@fpa-neny.org or (518) 458-7774 with any questions or concerns. We appreciate your flexibility during these uncertain times and look forward to having you join us for the 2021 Symposium.

And, finally, while we have become quite comfortable and proficient with Zoom meetings, hosting seven meetings in one day is a tall order, so we greatly appreciate your patience and flexibility.

THANK YOU!