eMoney Summit
PLANNING BETTER TOGETHER

Schedule

Day 1 - Monday, October 21st

EXHIBIT HALL & eMONEY PRODUCT EXPERIENCE

9:00 a.m. - 6:00 p.m.

Visit our sponsors' booths and the eMoney Product Experience to learn more about products, updates, and services.

NETWORKING LOUNGE

9:00 a.m. - 6:00 p.m.

Join our live virtual networking lounge to engage in open conversation with others in the industry about how to plan better together. This forum allows you to learn best practices and potential new ways to leverage eMoney. *(Sponsored by Finteract)*

MAIN STAGE

10:00 a.m. - 11:05 a.m.
eMoney Leadership, Research, and Roadmap

1. Opening Remarks: Better Together

Join eMoney CEO Susan McKenna as she kicks off Summit 2024, sharing her perspective on how collaboration with our clients, partners, and colleagues yields success. She'll also present a sneak peek of the event, previewing exciting keynotes, new eMoney research, product updates, and more. After Susan's remarks, you'll understand the depth of this year's Summit theme, "Planning Better Together."

2. Collaborative Planning: Research and Insights

In this constantly evolving industry, achieving the best outcomes requires strong partnerships and collaborative relationships. This presentation offers insightful data derived from comprehensive proprietary research conducted with financial professionals and end-clients on the key collaborative planning approaches and their impact on client satisfaction and success—all to highlight how to plan better together.

3. eMoney Product Vision and Roadmap

Join us to explore our newest innovations and upcoming enhancements, designed to simplify and elevate the planning process while creating more engaging experiences for financial professionals and their clients. We'll share tools that streamline your workflow and empower you to create truly personalized financial plans.

4. Live Q&A with eMoney Product Experts

Join us for a Q&A session immediately following the product roadmap presentation. This session offers a unique opportunity to engage directly with members of our Product Team to ask questions on specific features and strategic priorities.

Day 1 - Monday, October 21st

BREAKOUT

11:15 a.m. - 12:10 p.m.

Retirement 101: The Seven-Minute Retirement Plan (1 CFP® CE credit)

Retirement planning is a time-consuming process. Learn two workflows that can be used to deliver a quick retirement plan, making it easier than ever to provide your clients with a high-level snapshot of their future.

BREAKOUT

11:15 a.m. - 12:10 p.m.

Using the Client Portal to Enhance the Client Experience (1 CFP® CE credit)

The Client Portal is a one-stop shop website that encompasses a client's entire financial picture. Learn how to utilize all features of the Client Portal to enhance client engagement effectively and explore how integrating financial psychology can deepen client understanding, improve decision-making, and foster a more meaningful client-advisor relationship.

BREAK

12:10 p.m.-1:00 p.m.

BREAKOUT

1:00 p.m.-1:55 p.m.

Understanding Social Security Decisions in eMoney (1 CFP® CE credit)

Social Security can be an important piece of a client's retirement plan. When is the right time to file for benefits? This deep dive into Social Security planning will explore the optimal strategies and timing for claiming benefits, ensuring your clients maximize their retirement resources.

BREAKOUT

1:00 p.m.-1:55 p.m.

Adapting to Change: The Role of AI in Shaping the Future of Financial Planning (1 CFP® CE credit)

Explore how AI can enhance financial planning by complementing human expertise. Learn about the critical intersection of financial planning, technology, and psychology to deliver personalized advice in our rapidly changing industry. This session delves into workforce dynamics, necessary skills for future advisors, and the evolving role of financial planners.

ROUNDTABLE

1:00 p.m.-1:55 p.m.

Peer to Peer Roundtable: Common Hurdles and Creative Solutions

Open discussion about hurdles faced in your practice and how you overcame them. This could include challenges like acquiring new clients, technology adoption, or regulatory compliance. The audience is invited to participate by sharing similar experiences and alternative solutions.

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BREAKOUT

2:05 p.m. - 3:00 p.m.

Retirement 201: Does Your Client Require a More Complex Retirement Plan? (1 CFP® CE credit)

This session delves into retirement complexities, offering diverse planning techniques and demonstrations of how to confidently optimize and stress-test your client's plan. Discover strategies tailored to individual needs and learn how to present solutions effectively in Decision Center.

BREAKOUT

2:05 p.m. - 3:00 p.m.

Driving Client Motivation Through Accountability Strategies (1 CFP® CE credit)

How do we motivate clients to work on and engage in their financial plan? By aligning their goals with their values through an emotional interaction that connects them to their "why." Be part of this insightful discussion on increasing accountability and motivation.

SPONSOR BREAKOUT

3:10 p.m. - 4:05 p.m.

Allianz: Decumulation Diversification: Hedging against potential future expenses

A look at how a Registered Index Linked Annuity (RILA) with an income benefit rider can help fund future expenses in a modernized, asset and cost-efficient strategy. This presentation will focus on high-net-worth clients and clients already with a high probability of success. By utilizing a RILA within a financial strategy, we will show how to help address the potential downside risk of a client's portfolio, potentially increase drawdown efficiency, and provide clients access to income to help hedge against future expenses.

SPONSOR BREAKOUT

3:10 p.m. - 4:05 p.m.

Fidelity Charitable: Identifying Charitable Planning Opportunities (1 CFP® CE credit)

According to the Giving USA report, Americans gave nearly $500 billion to charities in 2022. With charitable giving hardwired into many Americans, it's fair to assume your clients are giving to charity. You may be missing an opportunity if you are not talking to your clients about this element of their budgets and financial plans. In this session you will learn to identify charitable planning opportunities in your current book to deliver greater value to your clients, entrench your relationships and be a hero with tax-smart strategies.

Day 1 - Monday, October 21st

SPONSOR BREAKOUT

3:10 p.m. - 3:40 p.m.

MaxMyInterest: Why Cash Matters: Options for Clients to Earn More on Cash in 2024 and Beyond

As you help clients navigate the shifting interest rate environment, it's important to be aware that many clients are still accustomed to low returns on the cash that is held outside their portfolio. After a decade of low interest rates, many clients are now seeing more impressive returns on money market funds and other cash equivalents, but could often do better with the help of their advisor. We will help you understand the macroeconomic factors that have shaped our current landscape including current and historical trends in interest rates, inflation, and the size of the bank deposit market. You'll learn about the options for held-away cash and their benefits and risks. This webinar will empower you with knowledge and tools to enhance your clients' cash returns, and that cash is not overlooked within their financial plans.

BREAKOUT

4:15 p.m. - 5:10 p.m.

Basics of Estate Planning in eMoney (1 CFP® CE credit)

Learn how to maximize and streamline meaningful estate planning recommendations and conversations in eMoney by identifying estate flow chart tools, comparing estate tax liability, and projecting income for a surviving spouse within Decision Center.

BREAKOUT

4:15 p.m. - 5:10 p.m.

Annuities Unwrapped: Your Guide to Secure Income in eMoney (1 CFP® CE credit)

Discover how to utilize eMoney's annuity workflows to demonstrate how integrating guaranteed income into their retirement plans can mitigate market volatility concerns and secure their financial future.

KEYNOTE SPEAKER

5:20 p.m. - 6:15 p.m.

Erica Dhawan: Collaborate Faster and Further, Together

Discover how to decode the new signals and cues that have replaced traditional body language in online communication, impacting our innate capacity to understand each other. Erica Dhawan shares cutting-edge research and storytelling to reveal how to develop communication skills with collective understanding to enhance connection, build trust, and drive innovation.

Day 2 - Tuesday, October 22nd

EXHIBIT HALL & eMONEY PRODUCT EXPERIENCE

9:00 a.m. - 6:00 p.m.

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NETWORKING LOUNGE

9:00 a.m. - 6:00 p.m.

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8:00 a.m. - 10:00 a.m.

CFP® Board Code of Ethics and Standards of Conduct (2 CFP® CE credits)

In need of CFP® Board approved Ethics CE credit? This program has been designed to educate CFP® professionals on CFP® Board's Code of Ethics and Standards of Conduct, effective October 1, 2019.

KEYNOTE SPEAKER

10:10 a.m. - 11:10 a.m.

***LIVE* Roben Farzad: Trends & Transformation: A Look at the Global Economy**

Roben Farzad offers a refreshing perspective on market trends and the economy. His insights help businesses navigate rising interest rates, inflation, supply chain challenges, global conflicts, and other key factors shaping the economy's future. Benefit from his engaging storytelling and problem-solving approach, empowering you to adapt your business effectively to the current economic landscape.

PANEL

11:20 a.m. - 12:15 p.m.

Panel Discussion: Planning Better Together: Intersection of Trust, Collaboration, and Technology (1 CFP® CE credit)

Join us for an insightful panel discussion on "Planning Better Together," where experts from diverse fields come together to explore the essential components of successful collaboration. Our distinguished panelists will share their experiences and expertise on building trust with clients and within teams, fostering collaborative relationships, leveraging technology for scalable personalization, and nurturing relationships that drive success.

Day 2 - Tuesday, October 22nd

NETWORKING LOUNGE

12:15 p.m. - 1:10 p.m.

Join our live virtual networking lounge for a real-time guided session.
(Sponsored by Finteract)

BREAK

1:20 p.m. - 2:15 p.m.

BREAKOUT

2:25 p.m. - 3:20 p.m.

***Live* Diving into the Latest Features of eMoney: Now That's What I Call eMoney 2024**

With the stresses of running your practice and the rate of technological change, it's easy to lose track of technological improvements. Explore the latest features and innovations in eMoney and learn best practices to help you deliver better client outcomes.

BREAKOUT

2:25 p.m. - 3:20 p.m.

Delivering Tax-Smart Strategies (Tax Alpha) (1 CFP® CE credit)

Become a next-level advisor by modeling tax-smart strategies in Decision Center to show clients how to keep more of their money by reducing current and future tax burdens.

ROUNDTABLE

2:25 p.m. - 3:20 p.m.

Peer to Peer Roundtable: Incorporating FinPsych into Your Practice

Discussion topics around the emotions of finances and market volatility, cognitive biases and investment choices, trust and technology, and financial literacy and psychological barriers. Share your own experiences and learn from others.

BREAKOUT

3:30 p.m. - 4:25 p.m.

Creating Impactful Client Deliverables (1 CFP® CE credit)

A collaborative approach to financial planning is essential for engaging client experiences. Learn how to plan better together and deliver plans that satisfy clients while also memorializing the conversation for compliance.

Day 2 - Tuesday, October 22nd

BREAKOUT

3:30 p.m. - 4:25 p.m.

***Live* How to Organize Your Planning (1 CFP® CE credit)**

Discover the full potential of eMoney's diverse tools and best practices for using them to streamline your financial planning process. Learn how to maximize organizational efficiency using technology to collect data, increase planning transparency, and simplify workflows with templates and alerts.

ROUNDTABLE

3:30 p.m. - 4:25 p.m.

Peer to Peer Roundtable: Improving Planning Collaboration Through Technology

Share best practices for leveraging technology to deepen client relationships, enhance communication, and deliver personalized financial advice and solutions that align with clients' goals and values.

SPONSOR BREAKOUT

4:35 p.m. - 5:30 p.m.

Nationwide: Social Security: The Choice of a Lifetime

The Nationwide Retirement Institute® Social Security 360® program offers an end-to-end client-ready solution that combines a suite of client education and engagement materials, a comprehensive analyzer tool for guiding well-informed filing decisions, and consultative support for answering questions and developing income plans.

By incorporating this strategy within eMoney, you can enhance the client-advisor experience, guiding conversations and confidently offering clients the best filing decision for their needs.

Use the program and its resources directly with clients through eMoney to help them break down and simplify Social Security rules and options.

SPONSOR BREAKOUT

4:35 p.m. - 5:30 p.m.

Flourish: Delivering on the commitment to holistic planning: addressing the forgotten 20% of client holdings (1 CFP® CE credit)

Every client has one or more savings accounts, and many advisors are surprised to learn how much cash is held away. In this session we'll talk about ways to bring those funds into your orbit and how to incorporate them into your planning process, including a look at rate simulations, fee billing options, and ensuring funds have adequate protection from bank failures.

5:40 p.m. - 7:40 p.m.

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Day 3 - Wednesday, October 23rd

EXHIBIT HALL & eMONEY PRODUCT EXPERIENCE

9:00 a.m. - 5:00 p.m.

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NETWORKING LOUNGE

9:00 a.m. - 5:00 p.m.

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PANEL

9:30 a.m. - 10:25 a.m.

Sponsor Panel Discussion: The Intelligent Technology Landscape: Shaping the Future of Wealth Management (1 CFP® CE credit)

In an era characterized by unprecedented technological advancements, the landscape of wealth management is undergoing a profound transformation. Intelligent technologies will provide new tools and strategies that enhance decision-making, deepen client interactions, and expand the accessibility of advice services. Join us as we convene industry insiders to analyze and discuss the latest innovations driving efficiency and collaboration while highlighting the enduring human elements at the heart of advice.

BREAKOUT

10:35 a.m. - 11:30 a.m.

Conducting Your Planning and Investment Review in eMoney (1 CFP® CE credit)

Clients want to know they are "doing the right things" with their investments. Using the interactive features of eMoney you can prepare your client's profile, utilize deliverables, and review and present plans to provide clients the peace of mind that their investments and financial goals align.

BREAKOUT

10:35 a.m. - 11:30 a.m.

Holistic Planning with Emotional Intelligence (1 CFP® CE credit)

Keeping clients engaged and committed to their financial plans is crucial to your success as a financial advisor. Discover the transformative potential of emotional intelligence (EI) in fostering meaningful connections between planners and clients as we delve into the intricate interplay of EI and holistic financial planning, backed by cutting-edge research and insights from eMoney.

Day 3 - Wednesday, October 23rd

MAIN STAGE

11:40 a.m. - 12:35 p.m.

***Live* Sponsor Presentation: Fidelity: Advisor as CEO**

Advisors want to spend more time to be the CEO of their client's life, not just their CIO. We discuss offerings from advisors to clients that drive the highest growth in advisor revenue, AUM, and client growth. We also discuss how advisors can help their clients avoid bad investing habits. Finally, we use behavioral finance to help clients achieve their wealth goal.

BREAKOUT

12:45 p.m. - 1:40 p.m.

Enhancing Estate Planning with Advanced Trust Techniques (1 CFP® CE credit)

Trusts can serve various purposes in a client's estate plan. Learn how to propose different trust structures using advanced planning tools in eMoney and best practices for demonstrating their impact in Decision Center. We will explore IDGTs, SLATs, and rolling GRATs to name a few.

BREAKOUT

12:45 p.m. - 1:40 p.m.

***LIVE* Michael Kitces: Is My Advisory Firm Normal? 6 KPIs to Track & Compare**

Financial advisors can face challenges in assessing their firm's financial health and determining if they are serving clients effectively. Discover Key Performance Indicators (KPIs) to understand profit margins, pricing, capacity, team productivity, and when to scale EBOC or hire sustainably.

NETWORKING LOUNGE

1:40 p.m. - 2:15 p.m.

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BREAK

1:40 p.m. - 2:15 p.m.

BREAKOUT

2:25 p.m. - 3:20 p.m.

Protecting the Plan with Insurance for Client Peace of Mind (1 CFP® CE credit)

Explore how to model real-life events in eMoney using Advanced Planning and what-ifs. Gain insights into the psychological and emotional impacts of these scenarios on clients and their plans. Join us to learn how to analyze current insurance coverage, identify gaps in coverage, and use financial planning approaches to build client trust in the insurance conversation.

Day 3 - Wednesday, October 23rd

BREAKOUT

2:25 p.m. - 3:20 p.m.

Fostering Connections: The Power of a Supportive Professional Network (1 CFP® CE credit)

This session explores the boundaries between financial planners and other professionals, discussing strategies for identifying when a client may benefit from specialized care. We'll emphasize the importance of building a supportive referral network of specialists who can offer targeted assistance beyond the scope of financial planning. By fostering these connections, collaborating effectively, and adhering to CFP® Board guidance on ethical referrals, financial planners can provide more holistic support to clients, leading to better outcomes and enhanced well-being.

BREAKOUT

3:30 p.m. - 4:25 p.m.

Using Monte Carlo Modeling to Drive Better Outcomes (1 CFP® CE credit)

Having a plan to implement, follow, and adjust over time is crucial for financial success, however, volatility and fluctuations in the market may leave your clients exposed. Utilize Monte Carlo functionality in Decision Center to create plans appropriate for your client's unique situation and risk tolerance to help them achieve their goals and a healthy financial forecast within market uncertainty.

BREAKOUT

3:30 p.m. - 4:25 p.m.

***Live* Optimize Your Planning Alpha: Leveraging Fintech and FinPsych in the Seven Planning Steps(1 CFP® CE credit)**

Using the CFP® Board's 7-Step Planning Process we examine the client's whole plan from beginning to end with an emphasis on addressing the whole person. Join us as we take a practical look at this process, considering both financial psychology and technology, to uncover new ways to add efficiency and engagement where technology, practice management, and financial wellness intersect.

ROUNDTABLE

3:30 p.m. - 4:25 p.m.

Peer to Peer Roundtable: Key Takeaways

Review best practices that emerged from the earlier roundtable discussions across all topics which could include such diverse takeaways as leveraging analytics, maximizing client engagement using eMoney, or ensuring high security levels. This summary can act as a guide on tactics advisors can implement in their practices.