2020 SESSIONS | SPEAKERS

COVID-19: The Fed's Response & Current Economic Conditions — Liz Laderman, PhD

In this presentation, we will discuss the Fed's emergency lending facilities and look at current economic conditions regarding the overall growth of the economy, employment, and inflation. We will talk about the responses to the Fed's emergency measures, possible recovery scenarios, different measures of unemployment, and the Fed's continuing commitment to 2% inflation.

The End of The Alphabet: Exploring Gen Z's Financial Behaviors — Stan Treger, PhD

With the number of members from the "Silent" and the "Baby Boomer" generations retiring currently, it is no surprise that much of our industry's focus is on this population. There is, however, a new generation entering the workplace. This "Generation Z," is now the most populous generation in the U.S. The oldest members of which, typically thought to be born after 1995, have been working for several years and may be starting families. Until now, no research has examined their financial attitudes and behaviors in detail, which can present challenges to advisors who aim to develop financial strategies for these young professionals. In this session, Stan will present research he has conducted on Generation Z's attitude toward a variety of financial topics. Learn how we as advisors can attract and provide the best advice to our next generation of clients.

Death of the Pie Chart: Stop Hiding Behind the Numbers in the Age of AI — Doug Fritz

Think of all the technology that exists inside of a hospital. MRI, EKG, X-ray, and a whole alphabet soup of different machines that can show every granular detail about who we are and what ails us. Now, consider how worthless all this technology is without the interpretive and communicative skills of a trained physician. Our analytical skills will always be limited by how well we can communicate our insights to clients. Do not fall into the trap of trying to over-educate as to discuss at our level, learn to communicate at theirs. Join Doug Fritz as he explains how to think about technology and to utilize tools which will help us deliver impactful advice.

New World or Same Old? Investment Markets Post-Pandemic — Eduardo Repetto, PhD

What have we learned from this year's market? What is the same as in other crashes and recoveries and what is different? What can we do when the markets are disorderly? What is new with value-, small-, and profitability-premiums? Are ETFs or mutual funds more suited to volatile markets? Join us in a moderated discussion with Eduardo Repetto, Ph.D., Chief Investment Officer of Avantis Investors™ as he tackles these questions and more. Audience participation is encouraged so bring your questions!

Wisdom in Our Midst — Various

This will be a free-wheeling session composed of a panel of Roundup participants answering questions that have been submitted by the other participants on any planning-related topic.

Schedule

Friday, 8/7/2020

TIME	***TOPIC***	***SPEAKER***
9:30 - 10:45	COVID-19: The Fed's Response & Current Economic Conditions	Liz Laderman, PhD
11:00 - 12:15	The End of The Alphabet: Exploring Gen Z's Financial Behaviors	Stan Treger, PhD
1:15 - 2:30	Death of the Pie Chart: Stop Hiding Behind the Numbers in the Age of AI	Doug Fritz
2:45 - 4:00	New World or Same Old? Investment Markets Post-Pandemic	Eduardo Repetto, PhD
4:15 - 5:15	Wisdom in Our Midst	Various