Updated 7/7/2021

2021 SESSIONS – Friday 8/6/2021 SPEAKERS

Inflation Expectations – Point/Counterpoint **Adam Schickling & Natalia Gurushina**
Will recent price increases continue? or will the Fed succeed in achieving its long-run inflation target? A moderated panel with interchange with attendees to explore the outlook for inflation and the economic indicators supporting that view.

Trust Documents Uncovered: Legal and Planning Perspectives from the Trenches
Emily Buchbinder & Ted George
Estate planning is an essential component of long-term financial planning. The rubber meets the road with estate planning documents, especially the trust document. This seminar will provide the perspective and skills required to understand trusts and support your clients more effectively. You will learn about the various revocable trust structures, how they work, and how to identify the type of trust your client has and why. You will also learn how to apply this knowledge as a financial planner and work collaboratively with estate planning attorneys.

Motivational Interviewing - How to Transform Financial Plans into Client Actions
Ju-Lu Huang Kuo
As advisors, we do not just want to provide advice; we want to MAKE A DIFFERENCE. To transform a financial plan into action towards a client's financial vitality. At the end of the day, nothing would make us happier than to hear a client exclaim "I made it happen!" Join Ju-Lu Huang Kuo as she teaches how we can use Motivational Interviewing to engage our clients, focus on their targeted behaviors, and evoke their inner motivation to inspire positive change.

The Growing Insurance Crisis in CA and Common Coverage Gaps **Brian Trouette**
What coverage do I need and when should I use it? Our clients work their whole lives to build a nest-egg to last them throughout their retirement, and gaps in insurance can easily become an Achilles Heel to a well-rounded financial plan. Moreover, making numerous small claims may lead to insurers dropping clients in less-competitive insurance markets. Leaving them un(der)insured when they could need the coverage most. Even if we are not in the business of selling insurance, we need to be helping our clients ask the right questions of their agent. As wealth grows, so too does the need for increased coverage. Join Brian Trouette as he explains the common blind spots of P&C insurance that we as advisors and planners should be thinking about to better serve our clients.

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

TIME	*TOPIC*	*SPEAKER*
9:45-11:00	Inflation Expectations – Point/Counterpoint	Adam Schickling & Natalia Gurushina
11:15-12:30	Trust Documents Uncovered	Emily Buchbinder & Ted George
1:15-2:30	Transforming Financial Plans into Client Actions	Ju-Lu Huang Kuo
2:45-4:00	The Growing Insurance Crisis & Coverage Gaps	Brian Trouette
4:15-5:15	Wisdom in Our Midst	Various