FPA Far West Roundup 2024 Sessions

Schedule

Thursday August 8

6:30pm | Red Room, Student Commons in Rachel Carson Plaza

Friday August 9

8:30am - 10:10am | Bitcoin and Blockchain Fundamentals	*Jay Jacobs*
10:20am - 12:00pm | Real Estate Tax Solutions	*John Bacigalupi*
1:30pm to 3:10pm | Tales from the Trenches: Understanding the Practical Problems Created by Poor Estate Planning	*Somita Basu, Esq.*
3:20pm to 5:00pm | Leveraging AI to Enhance Financial Advisory Services: A Practical Approach	*Chet Bennetts, CFP®.*
6:00pm to Late | Grassy Area between Rachel Carson Apartment Buildings 1 & 2	*Rachel Carson Apartment Buildings UCSC Campus*

Saturday August 10

8:30am to 10:10am | Creating a Goal Based Retirement Income Plan	*Michael Finke, PhD, CFP®*
10:20am to 12:00pm | How Combining Technology and Financial Psychology Transforms Client Outcomes	*Emily Koochel, PhD., AFC®, CFT-I™, BFA™*
1:30pm to 3:30pm | Top Down and Bottom Up: An Economic Review	*Chase Armer, CFP®, CFA®, EA*
3:40pm to 5:00pm | Wisdom In Our Midst	*Various*
Various Start Times | Saturday Social Events	

Sunday August 11

8:30am to 10:10am | Planning Student Loan Repayment without Sacrificing Your Clients' Goals and Dreams	*Rosario Chacón, MBA, EA, CFP®, FBS®, CSLP®, CDFA®, CLC*
10:20am to 12:00pm | Everything You Want to Know About Financial Therapy, but Didn't Know to Ask	*Elana Feinsmith, CFT-I™, CFP®, CRPS®*

FPA Far West Roundup 2024 Sessions

Friday August 9

8:30am - 10:10am | Bitcoin and Blockchain Fundamentals

Jay Jacobs

As cryptocurrencies continue to become more established, as advisors, we have a responsibility to understand the risks and opportunities presented by this budding investment space. What is it, where does it fit in a portfolio, and how can I answer the questions my client is asking me about investing in crypto? Learn all of that and in an introduction to Bitcoin and Blockchain Fundamentals with Jay Jacobs.

10:20am - 12:00pm | Real Estate Tax Solutions

John Bacigalupi

This Presentation offers a comprehensive exploration of tax-advantaged real estate investment strategies, focusing specifically on the utilization of 1031 and 721 exchanges through passive investment vehicles such as Delaware Statutory Trusts (DSTs) and Opportunity Zones.

Participants will gain an in-depth understanding of how these strategies provide substantial tax benefits, which are crucial for effective generational estate planning.

John will also be walking us through two detailed case studies of investors from the Bay Area to illustrate the practical benefits and potential drawbacks of these investment structures. Through these examples, advisors will be better equipped to help evaluate these complex investment tools while discussing with current and future clients.

1:30pm to 3:10pm | Tales from the Trenches: Understanding the Practical Problems Created by Poor Estate Planning

Somita Basu, Esq.

Join Somita Basu and be prepared to be immersed in practical knowledge from unraveling poorly drafted estate plans. Learn how to identify problematic areas within a client's financial picture, and how we can empower our clients to ask educated questions of the attorneys who draft their legal documents. Become a better advocate for your clients by learning about the process of unraveling difficult situations and understand the toll of how avoiding pertinent conversations today can have lasting impacts.

FPA Far West Roundup 2024 Sessions

3:20pm to 5:00pm | Leveraging AI to Enhance Financial Advisory Services: A Practical Approach

In today’s rapidly evolving financial landscape, clients demand more personalized, efficient, and accessible advisory services. Certified Financial Planners®, known for their client-centric approach, are uniquely positioned to meet these demands by integrating advanced technologies like AI into their practices. This session explores the practical application of ChatGPT, an AI language model, in enhancing the services provided by financial advisors, offering a detailed roadmap to leveraging technology while maintaining the personalized touch that is the hallmark of their services.

Chet Bennetts CFP®, CLU®, ChFC®, RICP®, CLF®

Saturday August 10

8:30am to 10:10am | Creating a Goal Based Retirement Income Plan

This presentation introduces a simple 4-step retirement income plan that helps advisors gain a deeper understanding of the client’s attitudes toward lifestyle and legacy goals. Goal-based retirement planning provides a client-driven process that matches investment risk and financial product selection to spending. Moving beyond a traditional withdrawal strategy and failure rates demonstrates the need for spending adjustments and provides a framework for discussing products that reduce longevity risk. Through a better understanding of client preferences and a deliberate discussion of objectives and income tradeoffs, the goal-based income plan provides retirees with a deeper and more realistic understanding of how their investments relate to how they spend in retirement.

Michael Finke, PhD, CFP®

FPA Far West Roundup 2024 Sessions

10:20am to 12:00pm | How Combining Technology and Financial Psychology Transforms Client Outcomes

Amidst evolving technology and heightened client expectations, financial advisors must surpass traditional planning approaches to truly elevate client satisfaction. To do so, they must explore the space beyond the plan—where technology, financial psychology (FinPsych), and commitment to service meet—to enhance their value and provide the personalized experiences their clients are seeking. eMoney's 2023 'Beyond the Plan' research shows that advisors who embrace tech-forward and FinPsych-forward practices see the best client results overall.

Emily Koochel, PhD., AFC®, CFT-I™, BFA™

1:30pm to 3:30pm | Top Down and Bottom Up: An Economic Review

A review of economic and financial analysis techniques from both a top down and bottom-up perspective using real time economic and financial data to decode the risks and opportunities investment managers should be aware of when navigating the current economic and financial climate.

Chase Armer, CFP®, CFA®, EA

3:40pm to 5:00pm | Wisdom In Our Midst

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

FPA Far West Roundup 2024 Sessions

Sunday August 11

8:30am to 10:10am | Planning Student Loan Repayment without Sacrificing Your Clients' Goals and Dreams

The presentation will present the audience with the various repayment plans. There have been several plans introduced throughout the years, with upgrades and a promise of greater benefits. However, choosing a plan is not a one-size-fits-all endeavor. Having a practical knowledge of the factors in student loan repayment planning can help financial advisors guide their clients through a sound payment plan without sacrificing the client's other goals and dreams.

Rosario Chacón, MBA, EA, CFP®, FBS®, CSLP®, CDFA®, CLC

10:20am to 12:00pm | Everything You Want to Know About Financial Therapy, but Didn't Know to Ask

As the title suggests, this presentation will be a deep dive into financial therapy. What is Financial Therapy? How do I integrate it into my practice? How does this help my clients better achieve their goals? Be prepared to be informed about all of the things you don't know that you don't know!

Elana Feinsmith, CFT-I™, CFP®, CRPS®

FPA Far West Roundup 2024 Speakers

Chase Armer, CFP®, CFA®, EA
Planned Solutions, Inc.

Chase Armer is a co-owner of Planned Solutions, Inc., a Sacramento based Financial Planning and Investment Advisory Firm, where he currently acts as a financial planner and is a member of the Planned Solutions Investment Management Committee. He holds a Doctorate in Business Administration and a Master's in Taxation from William Howard Taft University, a BA in Economics from California State University, Sacramento, and a Certificate in Personal Financial Planning from the UC Davis Extension. Chase is a past president of the Financial Planning Association of Northern California, and he has over 25 years of experience in the financial services industry. Chase works primarily with individuals and business owners who seek advice in all areas of financial planning with a special emphasis on Investments, Retirement Planning, and Income Taxation. Additionally, Chase has also authored several books on financial planning topics. His most recent offering, Financial Planning Insights, was published in May 2020.

John Bacigalupi
Cantor Fitzgerald Asset Management

John Bacigalupi is a Senior Vice President at Cantor Fitzgerald Capital, a global financial services firm and open architecture wholesale distribution company. CFC aims to leverage the strength of Cantor Fitzgerald to provide institutional solutions to the retail investor. John brings over 12 years of experience in the financial services and the alternative investment industry. John works directly with registered representatives and investment advisors in the Northern California and Nevada markets.

Somita Basu, Esq.
Norton Basu LLP

Somita Basu has a knack for unraveling legal, financial, and mathematical mysteries while paying meticulous attention to detail. She gives back to the community through her role as the Board Chair of the non-profit, Justice At Last. Somita served as the Vice Chair and Chair for the Solo and Small Firm Section of the California Lawyers Association, was the past editor of The Practitioner (the Section's premier publication), and was on the influential Project 2021 Committee for the CLA to determine the future of the association. She was also the Co-Chair of the Diversity, Equity and Inclusion Outreach Committee of the California Lawyers Association. Somita is a member of the American Bar Association and the Silicon Valley Bar Association. She is a fluent English and Bengali speaker and knows conversational Hindi.

FPA Far West Roundup 2024 Speakers

Chet Bennetts CFP®, CLU®, ChFC®, RICP®, CLF®
The American College of Financial Services

Chet Bennetts, an Assistant Professor of Financial Planning, serves as the Program Director for the CFP®/ChFC® programs at The American College of Financial Services. His journey of service began with an honorable 8.5-year tenure in the Marine Corps, both active and reserve, culminating in a medical discharge after a tour in Iraq in 2005. Currently, he is in the final stages of earning his Ph.D. in Personal Financial Planning at Kansas State University while also imparting his knowledge on financial planning to undergraduate students as an Adjunct Professor at the University of Nebraska in Lincoln. His research, primarily centered on behavioral finance, explores the intersection of financial, physical, and psychological well-being. Bennetts' scholarly contributions span a diverse range of topics, including the application of AI in financial planning, the influence of behavior on investment allocations during volatile markets, and the positive impact of bequest intentions on retirement satisfaction.

Rosario Chacón, MBA, EA, CFP®, FBS®, CSLP®, CDFA®, CLC
Wealth-Source Financial

Rosario founded Wealth-Source Financial in 2019 to serve other professionals like her: Often first generation graduates from college, with school debt, while building a career or a business, and raising a family. She believes in preparing well to better serve her community. She is a fiduciary (CFP®), a Financial Behavior Specialist (FBS®), a Student Loan Planner (CSLP®), and an Enrolled Agent (IRS). She knows first-hand that we must invest in ourselves to make changes in our journeys, and it is her mission to help you improve your financial health so you can focus on what you do best in life.

Elana Feinsmith, CFP®, CRPS®, CFT-I®
Oak Financial Coaching

Elana is one of a handful of Certified Financial Therapist-I™'s in the US who solely focuses on financial therapy and coaching and has a CFP®. As a financial therapist, Elana helps clients with the emotional side of money as it relates to things like over or under-spending, clarity on financial goals, estate planning, and being comfortable looking at and addressing their financial situation. As a result, her clients are able to take action towards achieving their financial goals. In addition to working with couples and individuals, Elana enjoys public speaking, teaching, and presenting to professional organizations as a thought leader in the field of financial therapy.

FPA Far West Roundup 2024 Speakers

Michael Finke, PhD, CFP®
The American College of Financial Services

Michael Finke, PhD, CFP® is a professor of wealth management and Frank M. Engle Distinguished Chair in Economic Security at The American College of Financial Services.

He received a doctorate in consumer economics from the Ohio State University in 1998 and in finance from the University of Missouri in 2011. He leads the O. Alfred Granum Center for Financial Security at the American College and is a research fellow at the Retirement Income Institute, and a member of the Defined Contribution Institutional Investment Association Academic Advisory Council. He also serves on the board of the Puerto Rico Pension Reserve Trust.

He is a frequent speaker at financial planning conferences and was named one of the 25 most influential people in the field of investment advising in 2020 and 2021 by Investment Advisor Magazine.

Jay Jacobs
BlackRock

Jay Jacobs is U.S. Head of Thematic and Active Equity ETFs at BlackRock. In this role, Jay is responsible for the research and development of the thematic ETF suite, driving commercialization of these products, as well as managing product sales and marketing for the thematic franchise. Jay is also responsible for BlackRock's active equity and international ETF suites. Previously, Jay joined Global X ETFs in 2013 and founded the firm's Research and Strategy team, which originates the firm's insights on markets and ETFs. Prior to joining Global X, Jay was a business analyst at the New York Stock Exchange (NYSE) in the ETF and Indexing Group, where he helped to launch hundreds of ETFs on the NYSE Arca trading platform. Jay is frequently cited expert in print and online publications as well as broadcast media including CNBC, Bloomberg, and The Wall Street Journal among others. He holds a BA from Emory University in International Studies and an MBA from Columbia Business School. He is a CFA charter holder.

Emily Koochel PhD, AFC®, CFT-I™.
eMoney Advisor

Emily Koochel, Ph.D., AFC®, CFT-I™, BFA™ leads eMoney Advisor's Financial Wellness team, where she focuses on innovative wellness research and education, in her role as Manager of Financial Wellness. Dr. Koochel also serves as Adjunct Faculty at New York University in the Financial Planning M.S. Program offered by the NYU School of Professional Studies Division of Programs in Business. She serves as a subject matter expert on understanding the effect of financial behaviors and financial decision making on personal and financial wellness, reviewing and authoring peer-reviewed journal articles, book chapters, and contributing to public scholarship. Most notably, she served as a co-contributor for CFP Board's book, The Psychology of Financial Planning. She holds a Ph.D. in Applied Family Science from Kansas State University, an M.S. in Financial Planning from Texas Tech University, the Certified Financial Therapist – I designation, and is an Accredited Financial Counselor and Behavioral Financial Advisor.