

2018 ABA Wealth Management & Trust Conference February 25-27, 2018--Orlando, FL		CTFA	CRSP	CSOP	CISP	CIMA-CPWA	CFP
<b>Sunday, February 25, 2018</b>							
9:30am-10:30 am	Catch-Up on CTFA Credits -Charitable Trusts	1.25	N/A	N/A	1.25	1	1
10:30am-11:30am	Catch-Up on CTFA Credits -Compromising Principles for Principals	1.25	1.25	1.25	1.25	Eth-1	0
11:30am-12:30pm	Catch-Up on CTFA Credits -HSAs: The Future is Now	1.25	1.25	N/A	N/A	1	1
2:15-3:00pm	<b>General Session:</b> The Outlook for Banking in the Trump Era	1	1	1	1	0.75	0
3:15-4:15pm	<b>Concurrent Sessions I-Select One:</b>						
	Systematic Fundamental Investing	1.25	1.25	1.25	N/A	1	1
	Mastering Affluent Client Acquisition	1.25	N/A	N/A	N/A	N/A	0
	Current Issues and Risks in Fiduciary Litigation	1.25	1.25	1.25	1.25	1	1
	Portfolio construction in the New Investment Regime	1.25	1.25	N/A	N/A	1	1
4:30-5:30 pm	<b>Concurrent Sessions II-Select One:</b>						
	Fiduciary Oil & Gas Management	1.25	N/A	N/A	N/A	1	0
	Update on the Regulatory Environment	1.25	1.25	1.25	1.25	1	1
	Lessons from eAdvisors 2.0: The Digital Imperative	1.25	N/A	N/A	N/A	1	0
	Wealth Transfer Report 2017: Inheritance Readiness Among the	1.25	N/A	N/A	N/A	1	1
<b>Monday, February 26, 2018</b>							
7:00-8:00 am	Educating Clients on risk Through Portfolio Construction	1	N/A	N/A	N/A	1	1
Power Breakfasts- Select One	Global Market Outlook 2018-Uncovering Opportunities	1	1	1	1	1	1
8:30-9:30 am	<b>General Session:</b> After the Earthquake: The New Scene in Washington	1.25	1.25	1.25	1.25	1	0
10:30am-11:30am	<b>Concurrent Sessions III-Select One:</b>						
	The Whole Family Advisor	1.25	1.25	N/A	N/A	1	1
	Banking's Response to the Department of Labor Fiduciary Rule	1.25	1.25	1.25	1.25	1	1
	Trust Decanting	1.25	N/A	N/A	N/A	1	1
	Guarding Seniors Against Financial Fraud and Exploitation	1.25	N/A	N/A	N/A	1	1
11:30am-12:45pm	<b>Lunch &amp; Learn:</b> The Gen-Savvy Financial Advisor	1.25	1.25	N/A	1.25	1.25	1.5
1:30-2:30 pm	<b>General Session:</b> Global Connectivity: The Outlook for the Markets	1.25	1.25	1.25	N/A	1	1
2:45-3:45 pm	<b>Concurrent Sessions IV-Select One:</b>						
	Environmental, Social and Governance (ESG) Investing	1.25	1.25	N/A	N/A	1	1
	Tax Reform-The Tax Cut & Jobs Act (TCJA)	1.25	1.25	1.25	1.25	1	1
	Selection of a Trust Jurisdiction	1.25	N/A	N/A	N/A	1	1
	Advising Women: Insights on Recruiting & Retaining Female Clients and Advisors	1.25	N/A	N/A	N/A	1	0
4:00-5:30 pm	<b>General Session:</b> The Essential Advisor and the Network...& OneWealth-Unifying...	2	2	2	2	1.5	0
<b>Tuesday, February 27, 2018</b>							
8:15-9:15 am	<b>Power Breakfast-</b> The Relationship-Based Marketing Imperative: Taking a CEO's...	1	N/A	N/A	N/A	1	0
8:30-9:30 am	<b>General Session:</b> MIT AgeLab: 8,000 Days of Retirement-A Phase of Life Waiting to...	1.25	N/A	N/A	N/A	1	1
10:30-11:30 am	<b>Concurrent Sessions V-Select One:</b>						
	Bank Wealth Management-the Value Proposition Post-DOL	1.25	N/A	N/A	N/A	1	0
	Crypto Decrypted	1.25	N/A	1.25	N/A	1	1
	Global Fixed Income	1.25	1.25	1.25	1.25	1	1
	Superior Manager Selection in Fiduciary Relationships	1.25	1.25	N/A	N/A	N/A	0
11:45am-12:45pm	<b>General Session:</b> How Advisors Can Thrive by Embracing Fintech and Goals-Based...	1.25	1.25	N/A	N/A	1	1
12:45pm-1:45pm	Catch Up on CTFA Credits -Reducing Personal Liability of Trustees	1.25	1.25	1.25	1.25	1	1
1:45pm-2:45pm	Catch Up on CTFA Credits -Taking the Risk Out of Life Insurance Trusts	1.25	1.25	N/A	N/A	1	1
<b>Total Allowed Credits-ABA PROFESSIONAL CERTIFICATION-Go to aba.csod.com and submit conference as one entry. CFP &amp; CIMA/CPWA please use sign-in sheet available at the registration desk to apply for credits</b>		<b>23.75</b>	<b>20.25</b>	<b>15.25</b>	<b>16.5</b>		<b>14.5</b>