

Please keep this notice for upcoming FPA NENY events

Prices held! What an INCREDIBLE line-up!

FPA NENY 2017-2018 CALENDAR OF EVENTS

<u>Date</u>	<u>Event</u>	<u>Time</u>	<u>Speaker/Topic</u>	<u>Location</u>
September 20 Wednesday	1.5 HOURS	7:30am Reg/Breakfast 7:45-9:30am program	Jeff Lanza, Retired FBI Agent, The Lanza Group Cybercrime: How to Protect Your Business Against the Latest Threats <i>Our September program is underwritten by Nationwide</i>	WRCC
October 19 Thursday	1.5 HOURS	7:30am Reg/Breakfast 7:45-9:30am program	Jeffrey Levine, CPA/PFS, CFP®, Chief Retirement Strategist, Ed Slott & Co. IRA Planning for Baby Boomers	WRCC
November 16 Thursday	Hilton Garden Inn, Clifton Park	7:30am Reg/Breakfast 7:45-9:00am Program	Marty Finn, Esq., CPA, Lavelle & Finn, LLP Making Taxes Great Again: Tax Reform the Trump Way and What Advisors Need to Know for Year End Tax Planning Purposes	
December 14 Thursday		7:30am Reg/Breakfast 7:45-9:00am Program	Tim Noonan, Managing Director, Russell Investments Helping Advisors Achieve Better Outcomes	WRCC
Jan. 18, 2018 Thursday		7:30am Reg/Breakfast 7:45-9:00am Program	Hugh Johnson, Chairman, Hugh Johnson Advisors 2018 Outlook for Financial Markets and the Economy	WRCC
February 15 Thursday		7:30am Reg/Breakfast 7:45-9:00am Program	Peggy Doviak, Ph.D., CFP®, DM Wealth Management Behavioral Finance, Communication, and Client Retention	WRCC
March 15 Thursday		7:30am Reg/Breakfast 7:45-9:00am Program	Amy Florian, MA & Fellow of Thanatology, CEO, Corgenius Advising Clients Through the Toughest Times of Life	WRCC
April 12 Thursday		7:30am Reg/Breakfast 7:45-9:00am Program	Tara Anne Pleat, Esq., Wilcenski & Pleat, LLC What Financial Advisors Need to Know about Special Needs Planning	WRCC
May 17 Thursday	All-Day	Eighteenth Annual SYMPOSIUM <i>Calendar subject to change.</i>		Hilton Garden Inn - Troy

Further program and pricing information is available at www.fpa-neny.org!

PRICES same as last year!!!! Save 38% by purchasing a Season Pass for JUST \$175 (!), your ticket to all eight of our Monthly meetings! Season Pass does NOT include Symposium.

Buy a **COMBO (Season Pass PLUS Symposium)** for \$320!! Both Season Pass and Combo tickets are available to Members only.

Any member may bring a 1st TIME guest (who is a considered a prospective member) FREE to a Breakfast Meeting, just contact Stephanie beforehand.

All meeting tickets are \$35 for members, \$55 for non-members.

Directions to Wolferts Roost: www.wolfertsroost.com

Many thanks to our 2017-2018 Partners; please visit our website for contact information:

Gold: American Funds · The College Advisor of NY · Hartford Funds · MFS · Mirković Teal Group/First Trust

Silver: Adirondack Funds · NYLTCB · Walthausen & Co., LLC

Bronze: Atlas Private Wealth Management; Columbia Funds; Halliday Financial; Jackson National; John Hancock Mutual Funds; KAFL; Oppenheimer Funds, Inc.; SEI; Shipp Financial