



Society of Financial Service Professionals Twin Cities Chapter
Please add these dates to your calendar and remember to confirm
your attendance by registering online at www.sfsptwincities.org prior to the program!

2016/2017 Program Calendar

2016	Date	Speaker	Professional Interest Section/ Credits	Topic	Time	Location
July	7	Summer Social	Membership Recruitment /Networking		4:00 PM - 7:00 PM	Wander North Distillery
August	4	April Caudill, JD, CLU, ChFC, AEP Principal Financial Group	Business & Compensation Planning / 2 CE credits	<i>Advanced Solutions for Business Owner Needs</i>	11:30 AM - 2:15 PM	DoubleTree Park Place
September	1	Earl Cohen, Attorney Hellmuth & Johnson, PLLC	Estate Planning / 2 CE credits	<i>The State of Estate & Wealth Protection Planning: What our Clients May Not Know About their Planning Needs</i>	11:30 AM - 2:15 PM	Midland Hills Country Club
October	6	Dan Slater, President Core Income	Retirement Counseling / 1 CE credit	<i>Income Annuity Analytics by an Actuary</i>	11:30 AM - 1:30 PM	Midland Hills Country Club
November	3	Richard M. Weber, MBA, CLU, AEP® The Ethical Edge	Risk Management / 2 CE credit	HRI: <i>Funding for Success: Using the Historic Volatility Calculator to take a Deep Dive Beneath the Surface of IUL and VUL Policy Illustrations</i> HR II: <i>Thriving Beyond Midlife: Because Retirement Just Isn't Like It Used To Be!</i>	11:30 AM - 2:15 PM	DoubleTree Park Place
November	16	National VTC showing (Live)	Retirement Planning / 2 CE credits	<i>Supplemental Retirement Plans for Executives and Entrepreneurs</i>	11:30 AM - 2:15 PM	Braemar Golf Course
December	1	Corey Anderson, DIA DI Geek	Employee Benefits / 1.5 CE credits	<i>Protecting the Dash Instead of the Period - A Look at Income Protection</i>	11:30 AM - 1:30 PM	Midland Hills Country Club

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2017	Date	Speaker(s)	Professional Interest Section	Topic	Time	Location
January	5	Kathleen Edmond, Partner Robins Kaplan LLP & Richard Martinez, Partner Jones Day	3 credits MN Insurance ethics (No CFP credits)	<i>Ethics & Data Privacy Update for 2017</i>	11:15 AM - 3:30 PM	Midland Hills Country Club
February	2	Jim Nowak, Vice President Risk Management United Bankers' Bank	1 CE credit	<i>When Insane Becomes Sane</i>	11:15 AM - 1:30 PM	Midland Hills Country Club
February	15	National VTC showing (Live)	Practice Management No CE credits	<i>Technology in the Modern Financial Services Office</i>	11:30 AM - 1:30 PM	3800 American Blvd West, Bloomington
March	2	Brian Edstrom, Director of Securities Minnesota Department of Commerce	1.5 CE credits	<i>Senior Safe: Preventing Financial Exploitation of the Elderly</i>	11:15 AM - 1:30 PM	Midland Hills Country Club
April	6	Steve Benjamin, CEBS, CRPC, Manager-Advisor & Retirement Plan Services Sit Mutual Funds	Investment Management 1.5 CE credit	<i>Investing, Your Brain & Behavioral Finance</i>	11:15 AM - 1:30 PM	Midland Hills Country Club
May	4	Sheryl Morrison, Attorney Gray, Plant, Mooty	Estate Planning 1.5 CE credit	<i>Matching the Giving Plan to the Donor</i>	11:15 AM - 1:30 PM	Midland Hills Country Club
May	10	MBEA Luncheon	No CE credits	<i>Keynote: Neel Kashkari, President and CEO of the Federal Reserve Bank of Minneapolis</i>	12:00 PM - 1:30 PM	Nicollet Island Pavilion
May	17	National VTC showing (Live)	2 CE credits	<i>Social Security & Medicare Strategies for Middle Income Clients: Plan Today to Secure Tomorrow</i>	11:30 AM - 2:30 PM	Bell Plaza, 3800 American Blvd West, Bloomington
June	1	Jim Czechowicz, Public Affairs Specialist Social Security Administration	Retirement Planning 1 CE credit	<i>Social Security</i>	11:15 AM - 1:30 PM	Midland Hills Country Club

Program Details (Program details may change depending on event and location)

Program Locations:

Midland Hills Country Club | 2001 Fulham Street, Roseville, MN 55113

3800 American Blvd West, First floor conference room | Bloomington, MN 55431

Program Time: 11:00 AM Attendee sign-in & Networking, 11:30 AM Lunch Served, 12:00 PM - 1:30 PM Program **(or as noted for event)**

Program Cost: (or as noted for specific event)

Members of FSP \$20.00

Guests eligible for membership attending for the first time: No charge

Non-members or guest attending for second time: \$50

Sponsors: Per benefit package

Season Pass: \$180 The 2016 Season Pass provides per-registered, pre-paid attendance to all FSP-Twin Cities programs and events (except MBEA luncheon) July 1, 2016 - June 30, 2017. Purchase available online or by mailing a check.

CE Credits: Most programs will be eligible for 1-2 credits for MN Insurance, CFP and CLE. A certificate of attendance will be provided for CPE and PACE

FSP Twin Cities 2016 Program Chair: Joan Gilles, CRPC, CLU, ChFC, jgilles@financialplanpartners.com | 612.436.3733

Registration and Program Details Online at: www.sfsptwincities.org