



AGENDA



- 8:00 AM** Arrival, Check-in, Refreshments
Room: FinCoach Bar in the Estate
- 9:00 AM** Welcome | **Room: Finstock Ballroom**
- 9:15 AM** Keynote: Austin Hatch | **Room: Finstock Ballroom**
Overcome It | No CE
- 10:45 AM** Kathleen W. Bilderback, JD, LL.M., AEP | **Room: Finstock Ballroom**
Beyond the Basic Buy-Sell: It's More than Just Cross-Purchase or Redemption | 1 Credit CE MN Insurance & CFP Approved. MN CLE Pending.
- 12:00 PM** Lunch | **Room: Finstock Ballroom**
- 1:00 PM** Educational Breakout Session #1
Ross Bernstein | Room: Minneapolis City Limits
The Champion's Code: Building Relationships Through Life Lessons of Integrity and Accountability from the Sports World to the Business World | 1 Credit CE MN Insurance & CFP Approved. MN CLE Pending.
- Stuart C. Bear, Esq., Elizabeth C. Henry, Esq., Francis J. Rondoni, Esq. | Room: Ultra Minneapolis**
It's Mine Because Mom Liked Me Best: How to protect the estate plans of clients, family members, and friends from undue influence and exploitation arising from diminished mental capacity | 1 Credit CE MN Insurance & CFP Approved. MN CLE Pending.
- Pete Deavan | Room: Finstock Ballroom**
Economic Updates and Market Outlook | 1 Credit CE MN Insurance & CFP Approved. MN CLE Pending.
- Dyanne Ross Hanson, CLU, CFP, ChFC, CEPA | Room: Fin-Chella**
Exit Planning: A Guide to the Process | 1 Credit CE MN Insurance & CFP Approved. MN CLE Pending.
- Michael Sir, RHU | Room: Finapalooza**
How to Become a Highly Effective DI Producer | 1 Credit CE MN Insurance & CFP Approved. MN CLE Pending.
- 2:00 PM** Dessert Bar | **Room: FinCoach Bar in the Estate**
- 2:15 PM** Bryon Holz, CLU, ChFC, LUTCF, LACP | **Room: Finstock Ballroom**
Sowing the Seeds of Love: Building a Legacy through Multigenerational Education and Awareness | 1 Credit CE MN Insurance & CFP Approved. MN CLE Pending.
- 3:30 PM** Educational Breakout Session #2
Ross Bernstein | Room: Minneapolis City Limits
Wearing the C: Leadership Lessons from the Greatest Captains and Coaches in Sports | No CE
- Ron Linneman | Room: Ultra Minneapolis**
Stacked Against Employers and Employees: Why the Health Insurance System is Broken and What Can Be Done About It | 1 Credit CE MN Insurance & CFP Approved. MN CLE Pending.

- 3:30 PM Educational Breakout Session #2**
Hank Shea, J.D. | Room: Finapalooza
Top 10 List: Lessons Learned from White Collar Crime | 1 Credit MN Insurance Ethics CE Approved. MN CLE Pending. No CFP.
- Cozy Wittman | Room: Fin-Chella**
Significant New FAFSA and Financial Aid Changes | 1 Credit CE MN Insurance & CFP Approved. MN CLE Pending
- 4:30 PM – 6:30 PM**
Happy Hour | Networking with attendees and sponsors, Jorgensens Band, lawn games, appetizers, hosted Bar with drink ticket | **Room: Finstock Ballroom, Patio-back lawn, FinCoach Bar in the Estate**
- 6:45 PM Welcome to Dinner | Room: Finstock Ballroom**
Please place your dinner ticket and any special meal ticket at your place setting.
- 7:00 PM Dinner served**
- 8:00 PM Comedian John DeBoer**
- 9:00 PM Finaroo Goodbye**

FSP-Twin Cities & NAIFA-Minnesota Welcome you to Finaroo!



This QR Code takes you to the Finaroo handout tab at the website.



This QR Code takes you to the Finaroo home page at the website.

Key to rooms at Bavaria Downs:

- Finstock** - (Mainstage Ballroom)
- Ultra Minneapolis** - (Library near registration and main entrance)
- FinCoach Bar** - (Right of registration, access to patio)
- Fin-Chella** – (Upstairs and left down the hall)
- Minneapolis City Limits** – (Downstairs and first room on the left)
- Finapalooza** – (Downstairs and second room on the left)
- Restrooms** – (End of hallway left of main entrance)