



**FROM VULNERABILITY
TO VIABILITY** Foresight. Insight. Trust.

Webinar Agenda

November 28, 2019

9:00 am to 4:00 pm (PST)

(Remember to check your time zone for start and end times)

9:00 am	Introduction
	Investment Planning , in an uncertain world Mike Richard
	Case Study Activity: Demonstrating the Value of Advice
10:30 am	Break
	Today's Senior Clients , using foresight to reduce risk Arthur Fish, Lawyer
	Discussion Activity: The TCP Best Practice
12:00 pm	Lunch
	Facing Senior Client Issues , head-on Ellen Bessner, Lawyer
	Discussion Activity: Pitfalls of POAs & Joint Accounts
2:00 pm	Break
	Decumulation Planning , without running out of money Jason Heath, CFP®
	Case Study Activity: The Retirement Income Puzzle
4:00 pm	Close

All times are approximate and subject to change.