NEWS

For Immediate Release

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Alliance of Comprehensive Planners Announces 2022 Annual Conference Agenda

Mitch Anthony, Ben Malin, Kristen Schmidt and Arash Shokouh to keynote at in- person gathering slated for September in Minneapolis

WILMINGTON, NC [April 27, 2022] – The Alliance of Comprehensive Planners (ACP), the nation's leading community of tax-focused financial planners who provide comprehensive wealth building strategies for their clients on a commission-free retainer basis, has announced the featured speakers and agenda for their in-person conference this fall. The event will be held September 28-October 1, 2022 at the Hilton Minneapolis, MN.

The agenda is available here: https://2022.acplanners.org/agenda.

HOW TO PARTICIPATE

Participation is open to all interested financial professionals; one does not need to be an ACP member to attend. Early bird registration rates (which expire after August 27, 2022) are in effect now.

Journalists may request a press pass by contacting Leesy Palmer or Jonny Swift at ImpactMediaManager@ImpactCommunications.org.

Sponsorship opportunities are available. Interested companies may contact Haleigh Hughes at haleigh@acplanners.org.

FOUR FEATURED SPEAKERS WILL INSPIRE AND EDUCATE

Saturday, October 1 at 11:10 a.m.
Becoming a Better Biographer of Your Clients

Mitch Anthony is the founder and president of Advisor Insights Inc., The Financial Life Planning Institute, ROL Advisor, and Life-Centered Planners (U.K.). He is recognized around the globe for his pioneering work in life-centered planning.

Anthony is a consistently top-rated presenter who has been named "one of the most meaningful speakers in financial services today" and hailed as one of the industry's top "Movers and Shakers" for his pioneering work. He is the author of many groundbreaking books for advisors and consumers, including the perennial bestseller *StorySelling for Financial Advisors*. He is also a sought-after expert for the media and a regular columnist for *Financial Advisor* magazine. His columns have appeared on CBS MarketWatch and in the *Journal of Financial Planning*. Anthony is also host of the daily radio feature, "The Daily Dose," heard on over 100 radio stations nationwide.

Relationships, according to Anthony, are the result of the exchange of stories. The advisor's first responsibility is to understand the client's story and then to build a financial plan around that story. Anthony has identified three powerful forces influencing the movement of money either toward or away from the financial professional. Making connections by tapping into these three forces will ensure clients for life: 1) Intellectual: the force that causes clients to feel valued, understood, and important in the advisor's eyes. 2) Life: the force that makes individual life events important to each client and impacts their money decisions. 3) Emotional: the force that connects advisors to clients – the one that can close the door on all competitors.

In the advisor/client relationship, it is what advisors do not know about their clients that can jeopardize prospective and long-term clients alike. In this session, Anthony will inspire advisors and provide them with the tools necessary to have more meaningful – and productive – conversations. Audience members will walk away with fresh ideas on how to turn prospects into lifelong clients, as well as how to develop stronger and more fruitful relationships with existing clients.

Learn more about Mitch Anthony at Mitch Anthony.

Friday, September 30 at 9:00 a.m.
Monetary Policy and the Economic Outlook

Ben Malin is vice president of Monetary Policy and the Economic Outlook at the Federal Reserve Bank of Minneapolis. He oversees the division's economic analysis function, which is a primary source of support for President Neel Kashkari. His team also provides economic updates to the board of directors and contributes to academic research on a range of issues related to the policy mission of the Federal Reserve System.

Malin has been a senior research economist at the bank since 2012, and in that role he served as a policy advisor to President Kashkari and the FRS Committee on Credit and Risk Management. Malin has a bachelor of science in economics and mathematics from Iowa State University and a doctorate in economics from Stanford University.

The session will focus on the Federal Reserve's objectives (promoting price stability and maximum employment), the tools it uses to achieve these objectives (altering short-term interest rates and the size of its balance sheet), and the implications that current economic conditions and the economic outlook have for monetary policy going forward.

Learn more about Ben Malin at the Federal Reserve Bank of Minneapolis.

Friday, September 30 at 1:00 p.m.
Is There Really a "Hub" in My Tech Stack?

Kristen Schmidt is founder and president of RIA Oasis. Schmidt uncovers the real-time hurdles advisors face when it comes to technology, integrations, and workflow building. As a technology strategist and speaker, Schmidt works directly with advisors and planners to assess, research, and implement technology platforms. Her passion is uncovering business solutions by marrying tech with best practice initiatives. Schmidt's career spans over almost twenty years in financial services, specializing in operational efficiencies related to technology and business infrastructure. From managing operations of a now multi-billion-dollar RIA-based in the Midwest to being an alumni member of the TD Ameritrade Institutional Operations Panel, Schmidt uncovers the ever-changing tech landscape by being boots on the ground with a variety of influencers. She is now an agnostic, strategic partner to tech vendors, RIA firms, hybrid model firms, financial planning firms, consultants and custodians throughout the industry.

Schmidt will present a master class in evaluating a firm's entire technology ecosystem. From the four must-have tech tools to integrations that are key to efficient growth, Schmidt will share the best practices necessary to keep up with the ever-changing tech landscape. Through this interactive session, Schmidt will bring valuable insights regarding tech optimization and how to build accountability through technology.

Learn more about Kristen Schmidt at RIA Oasis.

Thursday, September 29 at 9:00 a.m.
Protecting Your Business From Modern Cyber Threats and Implementing Cybersecurity Policies

Arash Shokouh is a published inventor, computer engineering professor, and the owner of an IT security and support firm. Arash holds BS and MS degrees in computer engineering.

Ophtek (pronounced Off-Tech) LLC Owner and Technologist Arash Shokouh has had more than nineteen years of experience with technology spanning IT, engineering, and web security. He is a published inventor and also a part-time professor at San Jose State University's Computer Engineering department. A common thread that comes up on an almost daily basis from the firms supported by Ophtek is knowing how to protect data while staying compliant.

Technology is a part of every business. Financial service software options are endless. There's enough sensitive information passing through these systems to bring a firm to a halt. A common thread that comes up regularly is knowing how to protect client and company data while addressing IT compliance. In this session, Arash will show attendees the history of data theft and data loss, modern threats to be aware of, the future of IT best practices, and what every firm should be doing to protect themselves and address cybersecurity compliance.

Learn more about Arash Shokouh at Ophtek.com.

ABOUT THE ALLIANCE OF COMPREHENSIVE PLANNERS (ACP)

The Alliance of Comprehensive Planners (ACP), is the nation's leading community of tax-focused financial planners who provide comprehensive planning strategies for their clients on a commission-free retainer basis. As fee-only fiduciaries, ACP members are required to maintain the CFP® or CPA/PFS (or equivalent) designation and complete ACP's rigorous training program.

Through The Practical Wisdom podcast presented by the Alliance of Comprehensive Planners, ACP members share stories of how they became successful, fee-only, comprehensive financial advisors. Through these conversations, Practical Wisdom reveals the strategies, tips, and tools these advisors employed to get where they are today.

To learn more about this fiduciary network and its membership criteria and benefits and/or to find a certified ACP member, visit www.ACPlanners.org.

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