

# NEWS

For immediate release



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## Alliance of Comprehensive Planners Announces First-Ever Virtual Conference

*Keynote speakers Mitch Anthony, Susan Bradley and Natalie Choate to deliver practical ideas, technical information and united message of hope*

WILMINGTON, NC [September 22, 2020] – [Alliance of Comprehensive Planners \(ACP\)](https://www.acplanners.org), a community of tax-focused financial planners who provide comprehensive planning strategies for their clients on a fee-only retainer basis, has announced the 2020 ACP Annual Conference, to be held virtually October 28-30, 2020. Participation is open to all interested financial professionals; one does not need to be an ACP member to attend. The agenda is available here: [2020.acplanners.org/home](https://2020.acplanners.org/home). Registration for members and non-members is \$295 and can be found [at https://2020.acplanners.org/registration](https://2020.acplanners.org/registration).

### Sponsors thus far include:

- AICPA
- Asset Dedication
- Bert Whitehead, JD, MBA
- Dimensional Fund Advisors
- Law Office of Lori J. Neidel / Adviser Compliance Services
- LLiS
- Longbridge Financial
- MAGA
- Northpointe Bank

- Mortgage Twins / Wintrust Mortgage
- NAPFA
- Shareholders Service Group

Companies interested in sponsoring the ACP Annual Conference should contact Jill Colsch at [jill@acplanners.org](mailto:jill@acplanners.org).

## **REASONS TO ATTEND**

ACP's Executive Director, Joanne Warren, says the organization is excited about the upcoming conference and the chance to bring members and interested others, including prospective members and financial planning / fiduciary supporters, together, virtually, this year. "We hope to attract more participation than ever before from all parts of the country, with the virtual format," said Warren. "The ACP conference this year will feature engaging keynote speakers, presentations from industry experts and fellow advisors, and opportunities to connect during a time when most of us feel disconnected."

**In addition to the three keynote speakers featured below, other scheduled speakers so far include:**

- Marie Swift, Impact Communications
- Scott Frank, Stone Steps Financial, LLC
- Bob Keebler, Keebler & Associates, LLP
- Bill Mulvahill, Trailhead Planners, LLC
- Joe Alfonso, Aegis Financial Advisory
- Mark Stucker, School Match 4U

## **THREE NATIONALLY-KNOWN KEYNOTE SPEAKERS**

**Natalie Choate** of Nutter McClennen & Fish will deliver her keynote presentation "Planning for Retirement Benefits in a Post-SECURE World" on Thursday, October 29 at 11a.m. EDT. Her book "Life and Death Planning for Retirement Benefits" is a leading resource for estate planning professionals. Choate will highlight three major developments in planning for retirement benefits. The SECURE Act upended classic estate planning techniques by replacing the "life expectancy payout" with the "10-year rule" for most beneficiaries. The CARES Act cancelled required minimum distributions for 2020 and provides tax breaks for coronavirus-related distributions. Plus, there are new IRS life expectancy tables. Learn more about Natalie Choate on the ACP Speakers page: [2020.acplanners.org/featured-speakers](https://2020.acplanners.org/featured-speakers)

Choate will discuss:

- What to tell new clients about their options for retirement benefits
- Reviewing existing estate plans—don't change the document, change the plan
- How the 10-year rule works for individuals and trusts

- The four different sets of minimum distribution rules for the five categories of “eligible designated beneficiaries” who still get the life expectancy payout
- Alternatives such as charitable trusts, Roth conversions, annuities
- The SECURE Act’s effect on pre-2020 deaths
- Planning implications and the effect if clients already took RMDs this year

**Mitch Anthony**, Best-selling Book Author and President, Advisor Insights Inc. will deliver his keynote presentation, “Bringing Your Best in Challenging Times” on Friday, October 30 at 1:00 p.m. EDT. His thesis is that those who pull through times of crisis are led by sound principles, a positive attitude and the ability to listen intently and deliver empathetic advice. Mitch Anthony has been a reassuring source of wisdom and guidance to advisors for the last 20 years. Learn more about Mitch Anthony at [MitchAnthony.com](http://MitchAnthony.com).

Anthony will discuss:

- The revealing characteristics leaders demonstrate in times of chaos and uncertainty
- The do’s and don’ts when talking with clients during challenging times
- Getting—and understanding—the story of how clients have been impacted
- How to deliver substantive value in times like these

**Susan Bradley**, CFP<sup>®</sup>, CeFT<sup>®</sup>, founder of the Sudden Money<sup>®</sup> Institute and the Financial Transitionist<sup>®</sup> Institute will deliver her keynote presentation, “Change, Choice, and Consequences: Help Clients and Yourself Absorb Change, Make Good Choices, and Avoid Getting Stuck in Regret” on Wednesday, October 28 at 11:30 a.m. EDT. Bradley established the Sudden Money<sup>®</sup> Institute 18 years ago as a “community of practice” seeking to better serve financial planning clients by developing special processes and tools for the personal side of money and for clients going through transitions. This think tank created the Certified Financial Transitionist<sup>®</sup> (CeFT<sup>®</sup>) designation, and a division for training and certification called the Financial Transitional<sup>®</sup> Institute. Learn more about Susan Bradley and the Sudden Money Institute at [SuddenMoney.com](http://SuddenMoney.com).

Bradley will discuss:

- How to use the creative force within disruption while keeping the client safe, building confidence, and developing a new narrative
- Integrating a repeatable process to reframe tradeoffs and choices
- Key elements of a Financial Transitions Plan not found in traditional financial planning

## **PRACTICAL WISDOM FROM ACP FINANCIAL ADVISORS**

[The Practical Wisdom podcast](#) presented by the Alliance of Comprehensive Planners and hosted by ACP member Ken Robinson, CFP<sup>®</sup>, JD, recently released their fourteenth episode of ACP advisors sharing 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. Listen to these informational Practical Wisdom podcast episodes and more at <https://www.acplanners.org/media/podcasts>.

### **ABOUT THE ALLIANCE OF COMPREHENSIVE PLANNERS (ACP)**

The Alliance of Comprehensive Planners (ACP), is a community of tax-focused financial planners who provide comprehensive planning strategies for their clients on a fee-only retainer basis. ACP members are required to maintain the CFP® or CPA/PFS (or equivalent) designation, complete ACP's rigorous training program, and meet some of the highest continuing education requirements in the industry. To learn more about this fiduciary network or to find a certified ACP member, visit [ACPlanners.org](https://www.ACPlanners.org).

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