

# 22<sup>nd</sup> Annual Symposium

## PREPARING FOR 2020 AND BEYOND



### ETHICS 2019

Presented by  
Dan Candura, CFP®



### SHOULD YOUR CLIENTS BE PASSIVE OR ACTIVE

Presented by John Bryson,  
John Hancock,  
National Speaker



### QUALIFIED BUSINESS DEDUCTIONS – HOW IT'S CHANGING THE RETIREMENT LANDSCAPE

Presented by John Peterson,  
Kaufman and Canoles



### SOCIAL SECURITY RULES YOU NEED TO KNOW

Presented Lizna Odhwani,  
Public Affairs Specialist,  
Social Security Administration



### MARKET UPDATE 2020

Speakers:  
Steven Soukup &  
Mark Melcher,  
The Political Forum



Keynote Speaker

### Marc Short, Chief of Staff for Mike Pence

Marc Short currently serves as an Assistant to the President and Chief of Staff to Vice President Mike R. Pence. Marc initially joined the administration in early 2017 as Director of the White House Office of Legislative Affairs.

Prior to joining the Trump-Pence campaign, Marc was president of Freedom Partners Chamber of Commerce. Marc also served as Chief of Staff for the House Republican Conference from 2008 – 2011, and as Chief of Staff for Senator Kay Bailey Hutchison (R-TX) from 2006-2008.

Most recently, Marc was a partner at GuidePost strategies, as well as a Senior Fellow at the University of Virginia's Miller Center. In his early career, Marc was the Executive Director of the Reagan Ranch from 1998 - 2001, and served as the Executive Director of Freedom Alliance from 1995 - 1998.



### Dan Candura, CFP®

Ethics 2019 continues the interactive and engaging presentations that audiences expect from Candura Group by using polls and case studies

to keep everyone involved and learning. Attendees participate in an informative and engaging session that teaches the six learning objectives required by CFP Board for ethics training in 2019 through the use of 4 case studies.



**Thursday, September 19, 2019**

**DoubleTree by Hilton Hotel Norfolk Airport**

1500 N. Military Highway, Norfolk, VA 23502

7:30 a.m. ▪ *Check-in/Continental Breakfast*

8:00 a.m. to 4:30 p.m. ▪ *Programs*

*Speakers and topics are subject to change.*

**Continuing Education Credits: Up to 6 hours CFP and 6 hours Virginia Insurance**

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**SYMPOSIUM**  
2019

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- \$325 Nonmember

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