



June 7, 2019

New Hampshire Continuing Education Seminar

Event Schedule

8:00 to 8:45am Registration, Continental Breakfast & Meet with Sponsors

8:45am Welcome & Sponsor

9:00 to 9:50am Elder Fraud
Sunny Mulligan Shea and Brandon Garod

9:50 to 10:00am Sponsor Presentation

10:00 to 10:50am Current Economic Outlook
Lisa Shapiro, Ph.D.

10:50 to 11:00am Sponsor Presentation

11:00 to 11:50am Practical Strategies for Managing Investor Behavior
Eben Burr and Phil Rewilak

11:50-12:00pm Sponsor Presentation

12:00 to 1:00pm Lunch

1:00 to 1:50pm Exit Planning and the Use of ESOPs
Tabitha Croscut

Thank You
to Our

Platinum Sponsors

- Ballentine Partners
- Charles Schwab
- Hines
- Natixis
- T. Rowe Price

Gold Sponsors

- BBIM
- Nationwide



Sunny Mulligan Shea



Brandon Garod



Lisa Shapiro, Ph.D.



Eben Burr



Phil Rewilak



Tabitha Croscut

Welcome New 2019 FPA NEE Members!



Christopher R. Barnes
The Harbor Group, Inc.

Patrick R. Boyle

Robin C. Brigham, CFP®
*Hager Investment Management
Services, LLC*

Kristina J. Csaplar
The Harbor Group, Inc.

Barbara Deming

Maria L. Fantoni
The Harbor Group, Inc.

John D. Heller, LUTCF
American National

Nicholas Daniel MacDonald
Machias Savings Bank

Alexander N. Pantalone
Portland Integritas Advisors, LLC

Rick Peck
New Hampshire Charitable Foundation

Nick Prigitano, CFP®
Milestone Financial Planning LLC

Gary J. Page
University of Maine at Augusta

Happy Anniversary!

*Thank you for
your membership.*

35 Year member

Milton Martin

20 Year member

J. Michael Pierce

15 Year member

Charles North
Steven F. St. Pierre

10 Year member

Tim Fisher
Darin Pope
Daniel Cohen

5 Year member

Kimberly Furnald
Chris Penfield
I. Richard Ploss
Ronald Valpey



SAVE THE DATE

Continuing Education Seminars

CFP Ethics will be provided

September 20, 2019

**Vermont
Continuing Education Seminar**

Hilton Burlington,
60 Battery St, Burlington, VT 05401

October 25, 2019

**Maine
Continuing Education Seminar**

Portland Regency Hotel & Spa,
20 Milk St, Portland, ME 04101

FPA
FINANCIAL
PLANNING
ASSOCIATION

OF *NORTHERN NEW ENGLAND*

Chapter Office
admin@fpanne.org
www.fpanne.org