Amarillo Chapter Program

Mark Your Calendar for this National Broadcast Event

SAVE THE DATE!
Wednesday, February 15 12:00 – 1:30 CST
BYO Lunch
Hosted by Brown Graham & Co. in their media room
7431 Continental Parkway, Amarillo 79119

"Integrating Technology and the Next Generation into the Modern Financial Services Office"

Speakers: Daniel Brady, CFP, CLU and Brandon Abe, CFP

Join us for this lively and timely discussion of all the latest developments and trends impacting the way financial service professionals do their jobs today. Our speakers will answer your questions and address all the concerns you have about the multitude of technology issues and upcoming changes and challenges in the financial services profession.

Members and guest are welcome at no charge. Bring your own lunch.

REGISTER NOW!

RSVP to Francis Broyles at Navigation Financial: 806-331-2600 or fbroyles@navigationfinacial.com.

Integrating Technology and the Next Generation into the Modern Financial Services Office

A WEBINAR PRESENTED BY THE SOCIETY OF FSP

It is no secret that financial service professionals are confronted with a constantly changing environment and face challenges without precedent. High-speed microcomputer trading, robo-advisors, marketing through social technology, iPhone and tablet planning and trading...these developments and more currently face every modern financial service professional. So is the day of the financial service practitioner waning or is it about to take a quantum leap forward? And what does the smart advisor need to know about succession planning in this environment? Who will be serving your clients when you retire? From where will the next generation of financial service practitioners come?

Join us as our two expert speakers cover topics of concern to all financial professionals today:

- Leveraging relevant technologies—seeing technology as a partner, not a hurdle
- Creating a technologically integrated office
- Review of CRM and financial planning software
- Social media and thought leadership
- Boomers, Gen X, and Gen Y in the workplace
- Finding the next generation of advisors
- Addressing the robo-advisor phenomenon
- Creating a successful succession plan

Who Should Attend: Advisors across all sectors of financial services, including: Financial Planners, Investment Advisors, Insurance Producers, Attorneys, Estate Planners, CPAs, Retirement Counselors, Business & Compensation Planners

Educational Level: Appropriate for advisors at all levels of technical expertise, as the program addresses issues that all advisors face in their practices.

ABOUT THE SPEAKERS

Daniel Brady, CFP®, CLU®, is the Director of Financial Planning for Planning Capital Management in Haddonfield, NJ. Prior to joining Planning Capital Management he was a financial consultant with eMoney Advisor. He graduated from Saint Joseph's University in Philadelphia where he earned Bachelor's degrees in both Finance and Economics.

Brandon Abe, CFP®, is a Financial Planner with Planning Capital Management in Haddonfield, NJ. Prior to joining Planning Capital Management, Brandon was a Financial Planning Analyst and Planning Consultant at eMoney Advisor where he also served as a senior member of their Client Services Group. He graduated York College of Pennsylvania with a Bachelor's degree in Marketing.

Society of FSP™
Financial Service Professionals