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**ACCOUNTING**

# AICPA PFP Conference at ENGAGE 2020 Focuses on Financial Planning during COVID-19

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**AICPA<sup>®</sup>**

The CARES Act, market volatility, Social Security strategies and the impact of COVID-19 on financial planning have brought numerous challenges and opportunities to the ever-changing financial planning landscape. The best practices and cutting-edge strategies emerging from these uncertain times will be shared at the [AICPA's Advanced Personal Financial Planning \(PFP\) Conference](#) at ENGAGE 2020. The 33<sup>rd</sup> annual conference will take place [online](#) from July 20-22, 2020.

### **Top Technical Planning Insight from Leaders in The Profession**

Professionals looking to develop the essential skills to best guide their clients and firm into the future will benefit from in-depth technical sessions and panel discussions. In addition to the CARES Act, topics include the SECURE Act, the current state of Social Security, as well as the future of financial planning. The [conference agenda](#) has been curated to feature the most up-to-date practical information and technical knowledge in the areas of tax, retirement, estate, risk management, investments and more.

“Financial planning professionals looking to learn about the latest strategies to help them provide the highest professional service should not miss this chance to gain a wide-range of technical knowledge at this all-in-one interactive online learning event,” said Ted Sarenski, CPA/PFS, co-chair of the 2020 PFP Conference Planning Committee. “The sharpest minds in the profession will be sharing actionable information that attendees can use in practice right away.”

Professionals recognize the Advanced PFP Conference as one of the best conferences for technical education sessions. In fact, the high-quality, advanced knowledge shared this year will be brought by returning expert speakers who averaged a 4.6/5 satisfaction rating from attendees in 2019. “This year’s conference has added virtual networking events and other new features to enhance interaction and build a sense of community among attendees,” said Lauren Minch, CPA, CFA, CGMA, co-chair of the 2020 PFP Conference Planning Committee. “Expert speakers from all areas of financial planning will be hosting sessions where attendees can ask questions, participate in real-time polling, and live-chat with other attendees.” In addition to the PFP conference, attendees will have access to leading technical content within all 6 other conferences as part of [AICPA & CIMA ENGAGE](#) including: Advanced Accounting & Auditing, Advanced Estate Planning, , EDGE Career Development, Practitioners Symposium & TECH+ and Tax Strategies for the High-Income Individual.

**PFP Keynote speakers include:**

- Danielle Fava, Director of Innovation, TD Ameritrade Institutional
  - [What's the Next Big Thing](#)
- Scott Orr, VP of Government Relations & Public Affairs, Fidelity Investments
  - [Geopolitical Update: How the US Impacts the World, and the World Impacts Us](#)
- Mark Jeffries, author of “The Art of Business Seduction”
  - [Communication Excellence and Business Success](#)

#### **PFP Conference speakers include:**

- Ted Sarenski, CPA/PFS, CEO, Blue Ocean Strategic Capital
  - [Social Security – Where does it stand; How to Advise](#)
- Ed Slott, CPA, Partner, Ed Slott & Company
  - [Planning for Stretch IRAs After the SECURE Act](#)
- Michael Kitces, Publisher & Head of Planning Strategy, Nerd's Eye View | Buckingham Wealth Partners
  - [Best Retirement Ideas – Advising Retirement Clients in Market Volatility](#)
- Jeffrey Levine, CPA/PFS, Lead Financial Planning Nerd at Kitces.com
  - [CARES Act Planning Session](#)
- Matthew Rosenberg, CPA/PFS, President, RoseCap Financial Advisors
  - [Playing Defense in Uncertain Times: Managing Downside Risks](#)
- Lisa Featherngill, CPA/PFS, Head of Legacy & Wealth Planning, Abbot Downing
  - [Best Laid Plans – Cognitive bias and Unintended Consequences in Planning](#)
- Susan Bruno, CPA/PFS, Managing Director, Beacon Wealth Consulting South
  - [Navigating the Ever-Changing World of Long-Term Care Insurance Solutions](#)
  - [Life Insurance Panel: What to do and What NOT to do!](#)
- Stephan Horan, Managing Director, Americas Region & Professional Learning, CFA Institute
  - [Surviving in a post-COVID19 Era of Artificial Intelligence](#)
- Mark Klein, Esquire, Hodgson Russ LLP
  - [State Personal Income/ Trust Residency issues created by COVID-19](#)

#### **ENGAGE Keynote speakers include:**

- Daymond John, Entrepreneur, CEO, *Shark Tank* star
  - [A Fireside Chat with Daymond John](#)
- Barry C. Melancon, AICPA President and CEO – Erik Asgeirsson, CPA.com President & CEO – Sue Coffey, AICPA EVP of Public Practice – Tracey Golden, AICPA Chair
  - [Reimagining Accounting in Extraordinary Times](#)

**What:** AICPA Advanced Personal Financial Planning, at ENGAGE 2020

**When:** July 20-22, 2020. Online sessions will run from 11 a.m. to 5 p.m. Eastern each day, with virtual networking opportunities during breaks.

**Where: Online Press Registration:** For media who wish to obtain remote access, please contact Jon Lynch at [Jonathan.Lynch@aicpa-cima.com](mailto:Jonathan.Lynch@aicpa-cima.com) or James Schiavone at [James.Schiavone@aicpa-cima.com](mailto:James.Schiavone@aicpa-cima.com) (please note: advance registration is required).

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