



FINANCIAL
PLANNING
ASSOCIATION
MIAMI

THE 21ST ANNUAL

FPA OF MIAMI SYMPOSIUM

Ideas. Strategy. Connection.



DATE

November 12, 2026

TIME

8:00 AM – 7:30 PM

5:30 – 7:30 PM
networking & cocktails

LOCATION

Rusty Pelican

3201 Rickenbacker Causeway
Key Biscayne, FL 33149

Up to 6 hours of continuing education credits
CFP®, IAR, Florida Bar, Florida Insurance, CIMA - pending TBC.

ARRIVE. CHECK IN. CONNECT.

CONTINENTAL BREAKFAST + MORNING NETWORKING



CHECK-IN BEGINS
8:00 AM



Morning: Markets, Leadership & the Advisor of Tomorrow

The day opens with the defining investment themes shaping client portfolios, widens into the macro environment, and then turns to the business of delivering exceptional advice.

9:00 AM

The AI Arms Race: Global Investment, Infrastructure and the Battle for Economic Leadership

INVESTMENT PANEL

1 HR CE

AI is driving one of the largest capital-investment cycles in decades, with implications far beyond technology stocks. This interactive panel examines the race to build AI infrastructure, how the U.S., China and international markets are approaching it differently, and what the scale of spending could mean for industries, economies and portfolio allocation.

Daniel Santiago | State Street Investment Management

Apurva Schwartz | Harding Loevner

Nicholas Borst | Seafarer Capital Partners

10:00 AM

The Economy at an Inflection Point: Markets, the Fed and What Comes Next

ECONOMIC KEYNOTE

1 HR CE

Anthony Saglimbene brings the perspective of Ameriprise Financial's Chief Market Strategist to the forces shaping growth, inflation, the Fed, interest rates, and markets heading into 2027. A member of the firm's Global Asset Allocation Committee, whose market commentary is regularly featured by major financial media, he connects the macro outlook to the risks and opportunities advisors are navigating in client portfolios.

Anthony M. Saglimbene | Vice President & Chief Market Strategist, Ameriprise Financial

11:00 AM

Leading a High-Performing Advisory Practice

PRACTICE MANAGEMENT

1 HR CE

High-performing advisors increasingly need to lead as CEOs, not just practitioners. Wassan Kasey brings 22 years of industry experience and Capital Group's PracticeLab research, along with hands-on consulting experience with leading RIAs, to an interactive discussion of leadership, team structure, scalable growth and a differentiated client experience.

Wassan Kasey | Senior Vice President, Capital Group



WATERFRONT LUNCH.

PARTNER ACCESS. ACTIONABLE PLANNING.

The afternoon shifts from ideas to application.

Waterfront Lunch. Partner Access. Actionable Planning.

The afternoon shifts from ideas to application, beginning with the Vista Terrace experience and smaller partner conversations before moving into planning strategies advisors can take back to clients.

12:00 PM

Lunch on the Vista Terrace

NETWORKING

Take in the waterfront views of Biscayne Bay while connecting with fellow financial professionals, speakers and FPA Miami partners at one of South Florida's signature waterfront venues.

1:00 PM

Partner Roundtable Experience: Connect. Learn. Rotate.

PARTNER EXPERIENCE

Move through intimate, approximately 20-minute conversations hosted by FPA Miami partners and sponsors. Designed to complement the traditional exhibit experience, these interactive roundtables create space for more personal conversations, deeper engagement, and direct access to ideas, resources and solutions relevant to today's planning professionals.

2:00 PM

Beyond the 401(k): Advanced Retirement Plan Strategies for Business Owners

ADVANCED PLANNING

1 HR CE

Learn how to spot business-owner clients who may be leaving meaningful tax and retirement opportunities on the table. Robert Penafiel brings 30+ years of specialized experience designing 401(k), profit-sharing, cross-tested, cash balance, defined benefit, and combination plans. Interactive cases focus on what advisors should look for, what to ask and how customized designs and tax credits can improve client outcomes.

Robert Penafiel | President, Pension Services, Inc.

3:00 PM

South Florida Real Estate: Data, Demographics & Florida's Changing Property Tax Landscape

SPECIAL SESSION

1 HR CE

Ana Bozovic brings a mathematics-and-physics background to a data-first look at South Florida pricing, inventory, wealth migration, condos, affordability and property-tax policy. A four-term Miami Association of Realtors Governor and 2023 Market Insight & Leadership Award recipient, featured in the NYT, BBC, Time & Miami Herald.

Ana Bozovic | Founder, Analytics Miami.



THE FPA MIAMI PLANNING LAB

4:00 PM – 5:00 PM



CFP® CE
1 HOUR

YOU MAKE THE CALL: INSIDE A COMPLEX HNW / UHNW CLIENT CASE

THIS ISN'T ANOTHER PANEL. YOU'RE PART OF THE PLANNING TEAM.

Attendees become the lead advisor, make real-time planning decisions as the case unfolds, and then hear an interdisciplinary team challenge the assumptions, expose tradeoffs and react as new facts emerge.



THE CASE

HNW / UHNW: One Layered Case

A complex affluent family situation that evolves in real time, bringing together investment, tax, estate, retirement, risk-management and family considerations. New facts will force the audience and panel to revisit earlier decisions and weigh competing priorities.

THE CHALLENGE: Coordination, sequencing + tradeoffs



PRESENTED BY:

Arthur "Arty" Palermo Jr., CPA

Founder and Managing Partner, Palermo, Landsman & Ross

SUNSET NETWORKING

AND

Happy Hour

NETWORK. CONNECT. UNWIND.

The formal program ends with mission, recognition and community - then gives attendees a reason to stay, connect and enjoy the waterfront as Miami rush hour begins to ease.

5:00 PM

A Mission Beyond the Profession

VETERANS DAY RECOGNITION

A special presentation from Wounded Warrior Project honoring service, sacrifice, resilience and purpose beyond the profession.

Featuring: Tonya Oxendine
Wounded Warrior Project | Warriors Speak

5:30 PM -
7:30 PM

Sunset Networking & Happy Hour

WATERFRONT NETWORKING

Network. Connect. Unwind.

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Their support strengthens our profession, our community and the experience we create together.

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