

Tax Professional Training Day

AT WHITAKER BANK BALLPARK

8:00 A.M. – 4:00 P.M., THURSDAY, NOVEMBER 10, 2016

207 Legends Lane Lexington, Kentucky 40505

Engaging

SPEAKERS

Batting Practice

ENTERTAINMENT

Ballpark Food

AND DESSERT

This informative workshop offers CPAs, RPs, ERAs, and ERPAs a thorough examination of the following topics:

- Current ACA Healthcare Update
- Planning for a Disability
- Department of Labor Fiduciary Rules
- Ethics

Email Team@FamilyFinancialPartners.com or call 859.219.1006 to register. In lieu of a registration fee, we request you make a \$50 donation to the Family Financial Foundation, a nonprofit that helps Kentucky families. This event is limited to the first 50 registrants. Your registration will be confirmed by email.

Registration ends **Thursday, October 20**



FamilyFinancialPartners.com

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Investment Advisory Services offered through O.N. Investment Management Company. Securities offered by David E. Smyth, Alexander M. Roig and Brandon Schleiter, Registered Representatives, through: The O.N. Equity Sales Company, Member FINRA/SIPC, One Financial Way, Cincinnati, OH 45242 513.794.6794

Schedule

8:00	Registration & Continental Breakfast
8:30	Welcome
8:40	ACA Update & Compliance Challenges <i>John Humkey, CLU</i> <i>Employee Benefit Associates</i>
9:30	Thirty Years: 5 Things at a Time <i>Alex Roig, Sr. Partner, Family Financial Partners</i>
9:55	Jarrett's Joy Cart Check Presentation
10:10	Qualified Sick Pay Plans (QSPP) - "Planning" for Disability <i>Brady Serold, CLTC</i> <i>Ohio National Financial Services</i>
11:00	Lunch & Batting Practice
12:30	Buy, Sell, Hold: Investment Decisions in Today's World <i>David Smyth, Sr. Partner, Family Financial Partners</i>
12:55	The DOL Fiduciary Rule <i>Jay Bley, CRCP ONESCO</i>
1:45	7th Inning Stretch: Dessert Break
2:00	Ethics: Doing it Right is Better Than Hoping You'll Get a Chance to Do it Over <i>Burke Christensen, JD, CLU</i> <i>Robert B. Morgan Chair of Insurance</i>
4:00	Closing Comments



This CE workshop has been approved for 6 hours of CPE/CE credits for CPAs, RPs, ERAs, and ERPAs of Kentucky. IRS Qualified Sponsor #684 Provider Number UN108