



The Behavioral Financial Planning **EXPERIENCE**



May 14-17, 2020

in cooperation with the University of Georgia
Center for Continuing Education & Hotel

Thursday, May 14, 2020
Welcome Reception
Kick-off Keynote
Dinner* on your own in Athens
Friday, May 15, 2020
Breakfast on your own in the Bulldog Bistro
Introducing Behavioral Financial Planning (BFP)
Principles of Behavioral Finance
AM Break
The Psychophysiology of Client Behavior
Lunch & Client Communication Strategies
Solution Focused Financial Therapy
PM Break
Solution Focused Coaching
Recap of Day & Plan for Saturday
Dinner* on your own in Athens
Saturday, May 16, 2020
Breakfast on your own in the Bulldog Bistro
Group 1 at ASPIRE Clinic ¹
Group 2: Client Biases and the Big 5
AM Break
Group 2: Client Assessment
Lunch & Diversity in Financial Planning
Group 2 at ASPIRE Clinic
Group 1: Client Biases and the Big 5
PM Break
Group 1: Client Assessment
Group Dinner on your own in Athens*
Sunday, May 17, 2020
Breakfast on your own in the Bulldog Bistro
ASPIRE Debrief: Building a BFP Toolkit & Wrap
AM Break
CFP® Ethics (Optional)
Presentation of Certificates & Boxed Lunches



* Athens offers many fine dining experiences, check out our concierge for recommendations, and to book a complimentary shuttle!

Details are subject to change.

¹ Participants will spend time in the ASPIRE Clinic applying behavioral financial planning skills, evaluating the work of others, and assessing skill development.