

Continuing Education Program

Three Convenient Locations

**Savior Pastoral Center
Keleher Conference
Room**
12601 Parallel Parkway
Kansas City, KS 66109
(913) 647-0325

**LIVE STREAM
Christ the King Parish**
5973 SW 25th Street
Topeka, KS 66614
(785) 273-0715

**LIVE STREAM
Didde Catholic Campus
Center**
1415 Merchant Street
Emporia, KS 66801
(620) 343-6765

www.CFNEK.org/ce

Friday, June 7, 2019

Cost: \$75.00 – includes light breakfast and networking lunch

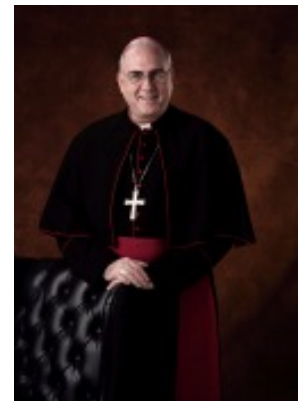
Continuing Education Hours (pending):

CLE 4 Hours (2 Ethics) for KS and MO
Insurance CE 4 Hours (2 Ethics) for KS
CFP CE 2 Hours
CPE Recommended for 4 Hours for
KS

CE Program Schedule

7:30 – 9:30 am **Registration Check-In (Online Registration \$75)**
8:00 – 8:45 am **Mass – Archbishop Joseph F. Naumann, Celebrant**
8:45 – 9:15 am **Continental Breakfast – Savior Pastoral Center**
Breakfast – Participants Visit Exhibitor Booths
9:15 – 9:30 am **Opening Remarks**

Archbishop Joseph F. Naumann
Lesle M. Knop, CFRE, Executive Director, CFNEK



9:30 – 10:20 am

SESSION I – 1 Hour CLE/CE

When to Retire

Presented by Dr. Martin Seay, CFP, *Kansas State University*

This presentation will examine how households that are close to retirement could reassess retirement plans. The focus will be on examining the marginal impact of saving and retirement choices on sustainable retirement consumption. Practical guidance will be provided to advisers on how to help clients evaluate options related to their retirement decisions.

10:20 – 10:30 am

Break – Participants Visit Exhibitor Booths

10:30 – 11:20 am

SESSION II – 1 Hour CLE/CE (Ethics for CLE and KS and MO Insurance)

Estate and Trust Administration Ethical Issues and Answers

Presented by B.J. Hickert, *Newbery, Ungerer & Hickert LLP*

Estate and Trust Administrations present multiple conflict of interest, compensation and other ethical issues. This presentation will present fact situations, applicable ethical rules and suggestions to resolve or avoid the issues.

11:20 – 11:30 am

Break – Visit Exhibitors

11:30 – 12:20 pm

SESSION III – 1 Hour CLE/CE (Ethics for CLE and KS and MO Insurance)

Planning Ahead for Clients – Ethical Considerations

Presented by Kate F. Baird, *Kansas Disciplinary Office*

Presenting the particulars of Supreme Court Rule 221 (2019 Kan. S. Ct. R. 276), giving examples of instances where the rule has been utilized for the benefit of clients and/or the attorney. The session will also include a discussion of succession planning that some other states are now mandating.

12:20 – 12:40 pm

Break – Networking Lunch

12:40 – 1:30 pm

SESSION IV – 1 Hour CLE/CE

Various Advanced Health Care Directive Laws across the US

Presented by Lenny Best, *Creative Planning*

Presenting what to look out for with the differences of state law concerning advanced health care directives, medical powers of attorney, and end-of-life legal framework from a Catholic perspective