AADMM

American Association of Daily Money Managers

VIRTUAL CONFERENCE

November 13 - 14, 2020

WWW.AADMM.COM

2020 VIRTUAL CONFERENCE

Welcome to the 2020 AADMM Virtual Annual Conference! This has been a year unlike any other, and the decision to present the conference virtually has led to some exciting changes. Where is our location this year? Wherever you are!

As you've come to expect from AADMM's conference, you will experience outstanding presentations which appeal to participants at every experience level. We know that networking with DMMs from around the country is a conference highlight, and we have included specific opportunities for communication. A main highlight this year is that you won't have to choose which sessions to attend and which ones to skip. All sessions will be recorded, allowing you the opportunity to view – and earn credit for – all sessions!

Based on your feedback, we have incorporated presentations on succession planning, ethics, people from different cultures, and much more. This brochure contains complete information about our general and concurrent breakout sessions, networking opportunities, and much more to get you excited. Grab your most professional top, pair it with your most comfortable pants and bunny slippers, and prepare to participate in AADMM's virtual conference!

CONFERENCE SCHEDULE

Friday, November 13

All times listed are Eastern Standard Time.

11:00 am - 11:15 am **Welcome and Overview**
Clare Dubé, Conference Committee Chair and Lewis Knopf, AADMM President

11:15 am - 12:15 pm **Ethics: Navigating Duties & Conflict of Interest**
Matthew Thiry, Esq., Matthew Thiry Law LLC
1.0 CEU Ethics

Because of the close relationship between DMMs and clients, DMMs must be mindful of duties and conflicts of interest. These issues can create potholes for DMMs to navigate as they proceed down the road of their client relationships. Join the discussion regarding identifying these duties and conflicts of interest. In addition, discuss how being proactive can help prevent client disputes relating to these topics.

12:15 pm - 1:15 pm **Concurrent Breakout Sessions**

Top Ten Things to Discuss with Your Clients About Succession Planning for Their Businesses
Matthew Thiry, Esq., Matthew Thiry Law LLC
David Hern, Sofer Advisors, LLC
1.0 CEU Standards of Practice & Types of Expenses

Whether a large business or a solo entrepreneur, all businesses need to consider succession planning. This panel discussion will provide insight into the succession planning process, so as to allow you to have a more informed conversation with your clients about their businesses. For illustration, the discussion will focus on succession planning for a DMM business, how a DMM business would be valued, and the different ways a DMM business could be transitioned.

COVID-19 - Through the Lens of a DMM
Rebecca Eddy, MBA, CDMM®, Eddy & Schein Group
Arlene Glotzer, Eddy & Schein Group

COVID-19 has been a wake-up call to most of us. We were caught off guard as our current business models were ill-suited to the pandemic's challenges. In this session we will discuss the evolution of the DMM business and focus on how to pivot to the "New Normal" of the current moment as well as prepare for other potential business disruptions. DMMs will be challenged to rethink ways of doing business, from identifying target clients, services offered and pricing, to assessing business structures, the need for training and credentials, insurance coverage, use of technology, marketing, and networking.

1:20 pm - 2:00 pm **Break**

2:00 pm - 3:00 pm **Cyber Security: Safety, Tools, and Techniques**
Susan Baer, Baer Technology
1.0 CEU Standards of Practice & Types of Expenses

Data hacking is big business. Tech expert Susan Baer will explain in simple terms how to stay vigilant and best serve your clients in our digital world. Learn how to protect data from internet-based emails and scams, the best ways to back up data and save passwords, and how to keep yourself – and your clients – protected on the computer and the phone. At the end of her talk, you will have a sound understanding of how to proceed safely in the challenging world of tech with your own devices and networks, and with those of your clients.

3:05 pm - 4:05 pm **Concurrent Breakout Sessions**

Paying for College
Akeiva Thomas, MSFP, CPA/PFS, CFP
Ballentine Partners
1.0 CEU Standards of Practice & Types of Expenses

Whether going to college is a decade or a month away, learn the tips, strategies, and tools you need to pay for this important life event successfully.

End-of-Life Doula Services
Colleen Cove, RN
Quality Care Education & Nurse Education
North Hill Needham Inc.
1.0 CEU Ethics

The main task of an end-of-life doula is to provide emotional support to those at the end of their life. Doulas understand and respect the client's basic need to connect, to be heard, to be understood, and to have their distress relieved. The daily money manager plays a key role in their client's life by delivering essential financial services to seniors. We will discuss the importance of aligning ourselves compassionately with the goals, wishes, and needs of your clients. We will practice listening intently and learn to honor the client's wishes by tuning into their messages they share beyond the words being spoken.

4:10 pm - 4:55 pm **Networking**

Networking with DMMs from across the country has long been a highlight of an AADMM conference experience, and this year's conference will offer that same opportunity! Join your fellow DMMs as participants split into multiple "rooms" based upon each participant's number of years in business. Discussions will be facilitated by experienced DMMs and board members.

4:55 pm - 5:00 pm **Day One Wrap-Up**

Saturday, November 14

All times listed are Eastern Standard Time.

11:00 am - 11:15 am **Welcome and Overview**

Clare Dubé, Conference Committee Chair and Lewis Knopf, AADMM President

11:15 am - 12:15 pm **Cultural Humility**

Clare Dubé, Financial Therapy

What is it? Why is it important? What role does it play in finance?

12:15 pm - 1:15 pm **Concurrent Breakout Sessions**

Winning Divorce Settlements for Women: Seven Secrets to Win a Negotiation

Rhonda Noordyk, CFEI, CDFA

Financial Wellness Center

Let's be honest! The divorce process is not kind, and women may feel intimidated or overwhelmed to ask for what they want or need. It is time to level the playing field! This presentation will give professionals the negotiating tips, tools, and practical strategies to empower their clients going through divorce.

How to Have Essential Conversations with Aging Parents About Their Finances

Connor Dolan

Fair Street Advisors

1.0 CEU Standards of Practice & Types of Expenses

This session will cover the topics of estate planning documents, scammers, long-term care downsizing for parents, tax implications, and the assets liquidation process.

1:20 pm - 2:00 pm **Break**

2:00 pm - 3:00 pm **Listening & Other Necessary Soft Skills IMPROV!**
Gina Trimarco, P10

Your brain is a muscle. In order to be an effective communicator and overall human being, you need to exercise that muscle. In this session, Gina will lead you through activities that will exercise your brain to be a more effective listener and observer of nonverbal communication.

3:05 pm - 4:05 pm **Concurrent Breakout Sessions**

Elevating Your DMM Business and Partnering with Aging Life Care Professionals
Kay Branford, DMM,
MemoryBanc
Colleen Duewel, MPH, CMC, CDP,
LionHeart Eldercare Consulting
1.0 CEU Payroll, Finance, Bookkeeping & Bill Paying

Learn about Aging Life Care Professionals (ALCP) and understand how they can become your best referral resource. In this case study, we will discuss how a DMM and ALCP worked in tandem to best serve individuals who did not have local family or loved ones and how this model can enhance your practice. This interactive session illustrates how ALCPs and DMMs, especially those that are legal decision makers, can mutually support their clients through their complementary skill sets.

Going Virtual: DMM Tools, Tech, and Tips
Alexis Boccanfuso, CPO

Going virtual? Whether you've made the choice on your own or have been forced to go virtual due to COVID, you will appreciate some solid advice from an expert in virtual daily money management. Walk through the day in the life of a veteran virtual daily money manager to discover the types of clients and services that can be managed virtually while exploring the tools, tech, and tips needed for success.

4:10 pm - 4:40 pm **Networking**
Networking on day two of the conference will focus on industry hot topics! Closer to the time of the conference, the committee will determine a list of discussion topics that are on everyone's mind. Discussions will be facilitated by experienced DMMs and board members.

4:45 pm - 5:00 pm **Final Remarks and the Announcement of the 2021 Annual Conference**

About the Presenters

Susan Baer

Susan Baer, president of Baer Technology, provides

onsite and remote tech support services, and has trained and supported more than 4,000 computer owners since November 13, 1994. The company provides one-on-one and group training and technology support to home users, small to medium-sized businesses, as well as large corporations. Susan also speaks to groups in person and online about a wide range of technology issues, including the relationship to brain health. Baer Technology serves clients locally and around the world.

Alexis Boccanfuso

Alexis Boccanfuso is a Certified Professional Organiz-

er who provides financial organizing, daily money management, and productivity consulting to individuals, seniors, high-net-worth families, and small businesses. With more than two decades of experience in the business world, Alexis knows her way around numbers, people, details, project management, and problem solving.

Alexis has a BS in business administration and previously worked at Deloitte and KPMG in Manhattan, where she consulted for clients in the financial, governmental, technology, health care, pharmaceutical, and insurance industries. Alexis is a USCA Certified Level II Curling Instructor, a practicing Buddhist, and loves to binge watch Netflix.

Kay Bransford

Kay Bransford transitioned from a corporate career to work as a daily money manager after caring for her parents. Today she runs an agency in the metro-DC

area serving adults with cognitive issues, busy professionals, and high-net-worth individuals. Before she even knew she was a DMM, her business, MemoryBanc, received an Older-Adult Innovation Award from AARP. For the past five years, her blog, *Dealing With Dementia,* has been named a top Alzheimer's blog by *Heathlie*. She wrote *MemoryBanc: Your Workbook for Organizing Your Life* and is regularly quoted in the media on articles related to the finances of caregiving.

Colleen Cove, RN

Colleen Cove, RN, has 40+ years' experience in providing care to people at end of life. As an end of life

doula, she accepts death as a natural, expected part of life. She provides nonjudgmental emotional/spiritual support in assisting each client with having personally meaningful experiences during the last path of their journey. Being a doula is about companioning, serving, and empowering the person at the end of his or her life.

Colleen Duewel

Colleen Duewel, MPH, CMC, CDP is the founder of

LionHeart Eldercare Consulting, an agency providing care management for the aging and disabled populations in Northern Virginia, Maryland, and Washington, DC. Colleen has extensive experience as an Advanced Care Planner, certified aging life care professional, nursing home ombudsman, certified dementia practitioner, and end of life doula. Colleen's goal is to foster autonomy, relieve family caregiver worries, and help older adults thrive.

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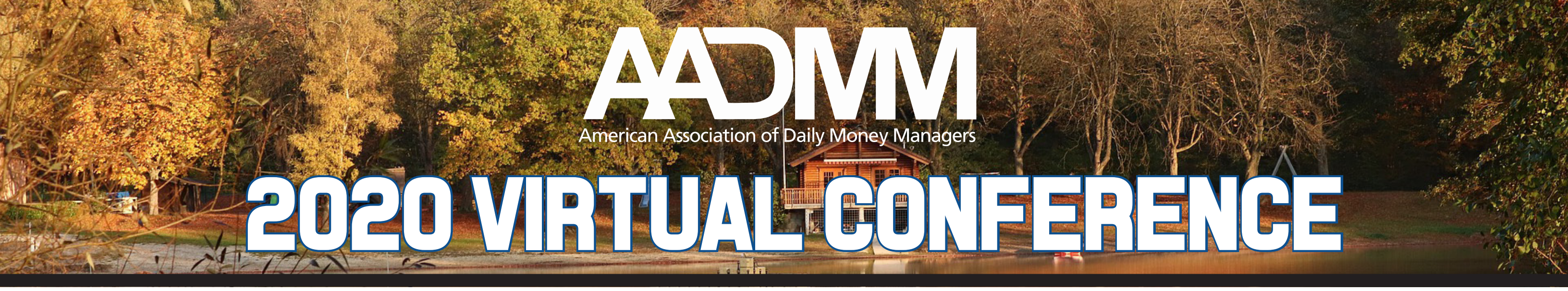


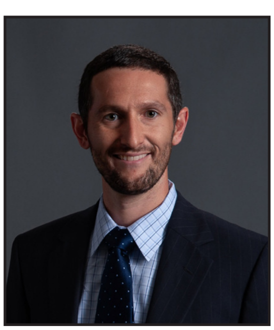
Rebecca Eddy

Rebecca Eddy, MBA, CDMM® is a founding partner of Eddy & Schein Group™ and was founding president of AADMM-GNY Chapter. She has taught AADMM's Business Basics course for many years, helped launch the Business Accelerator course last year, and has presented at past conferences. During the 30 years that Rebecca has been a DMM, her business has gone through many iterations, including solopreneur to partnership, growth in staff, expansion to CA, and multiple rebrandings, which gives Rebecca a unique perspective on pivoting when circumstances change. She has her BA from Kirkland College and her MBA from Yale School of Management.

Arlene Glotzer

Before joining Eddy & Schein Group in 2016, Arlene Glotzer, MA, had a career in foreign currency risk management at the Federal Reserve Bank of New York, Ford Motor Company and New York banks. While managing investments and tax matters and hiring caregivers for her parents, Arlene was drawn to the field of daily money management. She has become a strategic-minded DMM to clients across the age spectrum, with a particular interest in young and divorced people launching independent financial lives. Arlene received her BA from Binghamton University and her MA from the Johns Hopkins School of Advanced International Studies.

David Hern

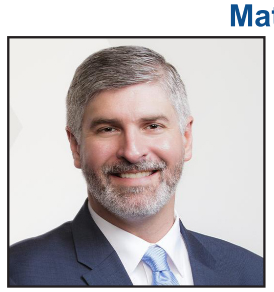


David is the founder and chief executive officer of Sofer Advisors, LLC, focusing on business advisory services related to litigation assistance, estate and tax planning, and business enterprise valuations for various privately-held and public companies. He is a qualified financial analyst with a proven ability to simply and clearly communicate analysis to boards of directors, presidents and CEOs, CFOs, controllers, and private equity portfolio managers. David has been recognized for enabling organizations to determine their enterprise and equity value for a variety of situations including strategic planning, sale or IPO, mergers and acquisitions, financial reporting (common stock, stock options grants, purchase price allocations, impairment analyses, etc.), and tax compliance (estate & gift, 409A, NUBIG). Industry experience includes, but is not limited to, professional services, business service, healthcare, information technology, financial services, and manufacturing and distribution.

Rhonda Noordyk

Understanding that divorce can be a complicated and painful journey, Rhonda left the financial industry in 2014 to pursue her passion of helping women achieve financial justice in their divorce. She hoped to offer a different kind of divorce experience; one that leads to empowering moments and living a happy and fulfilled life, post-divorce. Cue the Women's Financial Wellness Center! Designed to help women find a better way to maintain financial wellness throughout and after a woman's divorce, Rhonda uses her knowledge, passion, and experience to build leading-edge strategies that help her clients stay three steps ahead at all times. Her highly energetic presentations and solid practical content will leave the guests empowered!

Matthew Thiry, Esq.



Before becoming a lawyer, Matthew was a business owner, and there he learned the importance of business moving forward. Lawyers shouldn't be an expensive obstacle that prevents business. He understands the needs of business, and looks to provide efficient solutions instead of expensive delays.

Matthew's law practice focuses on business law and business litigation and is licensed to practice in Geor-

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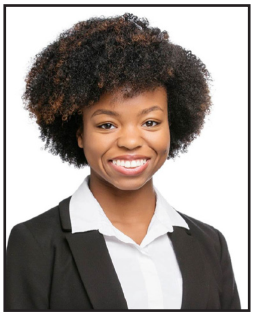
gia and Pennsylvania. He is based in Peachtree Corners, GA.

Akeiva Thomas



Akeiva is a Certified Public Accountant and Certified Financial Planner™ professional. She is the founder of The Bemused, a financial literacy brand catering to young adults. She also works as a financial planner at an established wealth management firm in the greater Boston area.

Akeiva is a college graduate, holding a Master of Science degree in financial planning and a Bachelor of Science degree in accounting & business administration with an emphasis in finance. Akeiva has a strong passion for helping others through the college planning process so they can avoid some of the mistakes she made in her journey.

Gina Trimarco

Chicago native Gina Trimarco is a serial entrepreneur with 25+ years of experience in marketing, sales, operations, and people training. She was recruited to Myrtle Beach, South Carolina in 2007 to take over an IMAX theater after successfully turning around the one at Navy Pier in Chicago. When the economy crashed in 2008, and she lost her job, she opted to start a business, Carolina Improv Company, which has been #1 on TripAdvisor for Nightlife Attractions since 2010. Soon after that she founded Pivot10 Results, a training and consulting firm that helps businesses and executives shift from people problems to performance results, through the application of soft skills training and strategic planning. She graduated from DePaul University and studied at Second City while pursuing her degree in communications. In addition to being a member of the Vistage International's Speaker's Bureau, Trimarco produces and hosts two podcasts – *The Pivotal Leader* and *Women Your Mother Warned You About*. She also has been a contributor to *Forbes.com* and *TrainingMagazine.com*.

Connor Dolan

Connor Dolan is an Investment Advisor Representative with Dynamic Wealth Advisors dba Fair Street Advisors. All investment advisory services are offered through Dynamic Wealth Advisors.

Born and raised in Madison, Connor has deep roots in the shoreline and is proud to serve his neighbors with professionalism and respect.

Connor has over 15 years of industry experience and works with clients throughout the shoreline and beyond. Connor is dedicated to respectful client relationships regardless of scale and delivers honest and comprehensive guidance. In 2018, Connor was named a Forbes Magazine Next Gen Advisors.

Connor has been an active Special Olympics volunteer for over 20 years, past President of the SARAH Foundation, Guilford Youth Mentor, and a financial coach at Women & Family Life in Guilford, CT.

He is currently serving as Chairman of the Board of Gaylord Specialty Healthcare in Wallingford, CT.

Registration Form

Register each person using a separate form, but total payment can be made with one check or credit card.

Registration must be received on or before November 10.

Complete name, include any designations (please print clearly) ________________

Name as you want it to appear on your virtual profile, if different ________________

Business Name ________________

Mailing address ________________

City ________________ State ________ Zip ________

Phone ________________

Email (Confirmations are only sent by email.) ________________

❐ Sponsors receive an electronic copy of the conference attendee list. Check here if you to ***not*** want to be included on this list.

To add more people, this form may be photocopied and total fee paid with one check or credit card.

2020 Conference Registration

The full conference registration fee includes access to ***all*** education sessions, both live and recorded. Recorded sessions will be available for one month following the live conference.

Conference Registration Fees

Member Fee: $250 per person
ALCA Member Fee: $250 per person
Non-Member Fee: $295 per person

Total for Conference Registration: $________

Registration Payment (Federal ID # 52-1944683)

❐ Please email me a receipt for my records.

Three options to register (online registration coming soon):

- Complete the form, scan, and email to registration@aadmm.com
- Mail form and check (payable to AADMM) to: AADMM, 174 Crestview Dr., Bellefonte, PA 16823-8516
- Fax this form with credit card information to 814-355-2452

Credit Card: ❐ Visa ❐ MasterCard ❐ AmEx ❐ Discover

Name on Card (print) ________________

Account Number ________________

Expiration Date ________________

Security Code ________________

Signature ________________

No refunds will be issued after November 10. Cancellations after November 10 will receive links to access the conference.
Changes or cancellations must be made in writing to Terri Breon at registration@aadmm.com. Substitutions may be made in advance.

9-4-20 RJ