Insider's Forum 2019 - Schedule of Events

Time	Wednesday, September 11, 2019 - Pre-Conference Workshops & Conference Sessions			
8:30AM - 12:00PM	**Workshop #1 - "Diamond Teams" - Angie Herbers, Angie Herbers, Inc. (additional cost for registration)**	8:30AM - 11:30AM	**HIFON Meeting & Workshop led by Shaun Kapusinski, Sequoia Financial Group 8:30-9:20AM "Managing Your Career Path" - Xandra Pendergrass, COO Signature Family Wealth Advisors 9:35-10:25AM "Day-to-Day Compliance" - Eric Sontag, President & COO, Sontag Advisory+Michael Del Priore, Bronfman Rothschild 10:40-11:30AM "Building Out Your Ops Team" - Stacey McKinnon, COO. Morton Capital Management**	
	Owners		***Operations (HIFON current & potential members)***	
12:30PM - 3:30PM	**3 CFP CEU Presentations: 12:30-1:20 "How to Manage Your Fixed Income Portfolios Like a Rock Star" - Jason Stuck, Northern Capital 1:30-2:20 "The Fundamentals of 1031 Exchanges and Qualified Intermediaries" - Warren Thomas, ExchangeRight 2:30-3:20 "Life, Disability Income and Long Term Care Insurance: What You Should be Recommending Now and Why" - John Ryan, RISC"**	**3 CFP CEU Presentations: 12:30-1:20 "Mainstreaming ESG: Performance AND Progress for Client Portfolios" - Venk Reddy, Zeo Capital 1:30-2:20 "From Tolerance to Solution: Latest Research and Practical Examples" - Shawn Brayman, PlanPlus Global 2:30-3:20 "Managing Fixed Income for Absolute Returns in an Uncertain Environment" - John Sheehan, Osterweis**	**"Managing Client Relationships" Training Workshop - Philip Palaveev & Janki Patel, The Ensemble Practice (Complimentary but preregistration necessary. Maximum of 60 registrants)**	
	Advisors	***Advisors***	***Newer Professionals***	
4:00PM-5:30PM (90 minutes)	**Announcements & Opening Keynote - "The Insider Community Town Hall Meeting" - Bob Veres, Inside Information+surpise special guests!**			
5:30PM - 7:00PM	***Opening Reception & Networking in the Exhibit Hall/Broadway West Prefunction***			
Time	**Thursday, September 12, 2019 - Conference Sessions**			
7:30AM - 8:30AM	***Breakfast Buffet in Cumberland 1-6***			
8:35AM-10:00AM (85 minutes)	**Student Intros & Announcements & Keynote #2 - "Identifying & Developing Leaders" - Philip Palaveev & Janki Patel, The Ensemble Practice**			
10:00AM -11:00AM	***Networking in Exhibit Hall - Broadway Ballroom West Prefunction***			
11:00AM -12:15PM (75 minutes) OR 11:00AM -12:00PM (60 minutes)	**Breakout #1 - "Wealth Management Strategy Development" (75 minutes) - Roy Ballentine, Ballentine Partners "**	**Breakout #2 - "Technical Topics Updates & Best Ideas " (75 minutes) - Ted Sarenski, Blue Ocean Strategic Capital+David Oransky, Laminar Wealth+Lisa Featherngill, Abbott Downing+Lyle Benson, L.K. Benson & Co. (moderator)**	**Breakout #3 - "Project Management: Tracking & Organizing Projects" (60 minutes) - Erica Farber, Balentine LLC+Rebeka Kohmescher, Altair Advisors+Lisa Crafford, Pershing Advisor Solutions (facilitator)**	**Breakout #4 - "Web Done Right: Why Advisors Aren't Getting Results Online & How To Fix It" (60 minutes) - Alex Wingert, Advisor Websites+Robert Sofia, Snappy Kraken**

	Owners	Advisors	Operations	All
12:00PM - 1:30PM	*Lunch with Roundtable Discussions - in Cumberland 1-6*			
1:30PM - 2:45PM (75 minutes)	**Breakout #5 - "The Tech Revolution in Portfolio Management" - David Armstrong, Monument Wealth Managementt+Gary Matthews, SRI Investing+Bob Veres, Inside Information (moderator)**	**Breakout #6 - "Controlling Your Clients' Health Care Costs" - Carolyn McClanahan, Life Planning Partners**	**Breakout #7 - "Defining Your Client Experience" - Kaylyn Melia, Socius+Jandy Rowe, Wipfli Financial Advisors+Gabe Muller, Muller Consulting (moderator)**	**Breakout #8 - "Joel Talks Tech" - Joel Bruckenstein, T3**
	Owners+Advisors	*Advisors*	*Operations*	*All*
3:00PM - 3:50PM (50 minutes)	**Breakout #9 - "Executive Compensation: Optimizing Values & Managing Concentration Risk" - Tim Kochis, Kochis Global**	**Breakout #10 - "Elevating the Client Experience" - Travis Brewer, TD Ameritrade Institutional**	**Breakout #11 - "Retirement Income Showdown: Risk Pooling vs. Risk Premium" - Wade Pfau, Retirement Researcher courtesy of Lincoln Financial**	**Breakout #12 - "Goals-Based Wealth Management" - John Anderson, SEI**
	Advisors	*All*	*Advisors*	*All*
3:50PM - 5:00PM	*Networking in Exhibit Hall - Broadway West Prefunction*			
5:00PM-6:15PM (75 minutes)	**Keynote #3 - "Leading Internally to Accelerate Through Your Firm's Growth Cycle" - Angie Herbers, Angie Herbers, Inc.**			
6:30PM - 7:30PM	*Reception & Networking in the Exhibit Hall/Broadway West Prefunction*			
Time	**Friday, September 13, 2019 - Conference Sessions**			
7:30AM - 8:30AM	*Breakfast Buffet*			
8:30AM-9:20AM (50 minutes)	**Keynote #4 - "Holistic Wealth Management, Technology & You" - Aaron Steinberg, E*Trade Advisor Services**			
9:20AM-10:35AM	*Networking in Exhibit Hall - Broadway West Prefunction*			
10:35AM - 11:25AM (50 minutes)	**Breakout #13 - "The "C" Client Dilemma" - Lisa Rapuano & Brent Weiss, Facet Wealth**	**Breakout #14 - "College & Newer Planner Recruitment, Hiring & Compensation" - Caleb Brown, New Planner Recruiting+Luke Dean, Utah Valley University**	**Breakout #15 - "Scale: What It Looks Like & How To Achieve It" - Christopher Lion, Barnett Financial+Michael Reed, Dakota Wealth Management**	
	Owners+Operations	*Owners+Operations*	*Operations*	
11:30AM -1:00PM (90 minutes)	*Lunch & Keynote #5 - "The Next Agenda" - Anders Jones, Facet Wealth+Davey Quinn, United Income+Bob Veres, Inside Information (moderator)*			
1:00PM-1:15PM	**Conference Wrap Up**			