



TOP ADVISORY TEAMS SUMMIT

February 1-3, 2016 | Bellagio | Las Vegas, NV

■ Team Management ■ Financial Planning ■ Business Development ■ Relationship Management

MONDAY, FEBRUARY 1, 2016

2:00 pm - 8:00 pm	Check In & Registration	Tower Ballroom Foyer
5:30 pm - 6:30 pm	Cocktail Reception	Tower Ballroom 5
6:30 pm - 8:30 pm	WELCOME DINNER & SPEAKER Geopolitics and the State of the World Sir John Sawers , Former Chief of the British Secret Intelligence Service (SIS or MI6)	Tower Ballroom 4
8:30 pm - 10:00 pm	Next Gen After Party	Renaissance Foyer

TUESDAY, FEBRUARY 2, 2016

7:00 am - 6:00 pm	Registration/Information Desk	Tower Ballroom Foyer
7:00 am - 8:00 am	Breakfast	Tower Ballroom 5
8:00 am - 8:10 am	OPENING REMARKS Sterling Shea , Associate Publisher, Head of Advisory & Wealth Management Programs, <i>Barron's</i>	Tower Ballroom 4
8:10 am - 9:00 am	GENERAL SESSION Strategic Team Development: Attributes of a Highly Effective Team Culture IMCA Moderated By: Sterling Shea , Associate Publisher, Head of Advisory & Wealth Management Programs, <i>Barron's</i> Deborah Montaperto , Morgan Stanley Private Wealth Management Spuds Powell , Kayne Anderson Rudnick Investment Management Bob Waldele , Merrill Lynch Wealth Management	Tower Ballroom 4
9:00 am - 9:25 am	Networking Break	Tower Ballroom 5

Attendees of the Barron's Top Advisory Teams Summit can apply for 7 CE CFP credits & 8 CE hours (toward CIMA®/CIMC®/CPWA® designations). Please have your badge scanned at every session.



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TUESDAY, FEBRUARY 2, 2016

9:25 am – 10:15 am	CONCURRENT BREAKOUTS	
	<ul style="list-style-type: none">• High Performance Teams: Drive Team Synergy & Efficiency IMCA Tim Ursiny, Founder, Advantage Coaching & Training, Inc. Raphael• Succession Smart: Finding the Right Fit for the Team IMCA Donna Drosner, Robert W. Baird & Co. DaVinci 1 Emily Phillips, Robert W. Baird & Co.• Outlook 2016: Global Opportunities During a Time of Volatility CFP IMCA DaVinci 3 Chis Dillon, Global Fixed Income, T. Rowe Price Tim Murray, Global Allocation, T. Rowe Price Jason White, International Equity, T. Rowe Price• 8 Game-Changing Secrets to Manage Your Advisor IMCA Tower 3 Bonnie Low-Kramen, Founder, Ultimate Assistant LLC• Smart Beta: Not New, Not Beta but a Growing Approach to Investing CFP IMCA Tower 8 Dan Villalon, Vice President, AQR Capital Management	
10:15 am - 10:30 am	Refreshment Break	Tower Ballroom 5
10:30 am – 11:20 am	CONCURRENT BREAKOUTS	
	<ul style="list-style-type: none">• What Matters Most – Team Management and Leadership IMCA Raphael Jonathan Beukelman, UBS Financial Services, Inc. Ross Levin, Accredited Investors, Inc.• Team Expansion: Knowing WHEN and HOW to Expand the Team IMCA DaVinci 1 Sarah Dale, President & Founder, Know No Bounds, LLC• The Alternative Landscape: How Successful Teams Deploy Alternative Strategies in the Current Market Environment CFP IMCA DaVinci 3 Walter Davis, Alternatives Investment Strategist, Invesco Danielle Singer, Client Portfolio Manager, Invesco Multi Asset Team	

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10:30 am – 11:20 am	CONCURRENT BREAKOUTS CONT'D	
	<ul style="list-style-type: none">• Top-Tier Service Planning for a Mass-Affluent and Retail Practice IMCA Tommy Jackson, Merrill Lynch Wealth Management Justin Samples, Fulcrum Wealth Management	Tower 3
	<ul style="list-style-type: none">• 2016 Political Landscape: the Fiduciary Rule and Beyond CFP IMCA Clarke Camper, Senior Vice President, Government Relations, American Funds from Capital Group	Tower 8
11:20 am - 11:35 am	Refreshment Break	Tower Ballroom 5
11:35 am – 12:00 pm	GENERAL SESSION Innovation for the Future of Wealth Management Tash Elwyn , President, Raymond James & Associates Private Client Group	Tower Ballroom 4
12:00 pm – 1:00 pm	LUNCH	Tower Ballroom 4
1:00 pm – 1:50 pm	GENERAL SESSION Macro Risks and Opportunities in Today's Market CFP IMCA Moderated By: Kristina Van Liew , Graystone Consulting, a business of Morgan Stanley Jim McDonald , Executive VP and Chief Investment Strategist, Northern Trust Matt McLennan , Head of Global Value Team, First Eagle Investment Management	Tower Ballroom 4
1:50 pm – 2:05 pm	Refreshment Break	Tower Ballroom 5
2:05 pm - 2:55 pm	CONCURRENT BREAKOUTS	
	<ul style="list-style-type: none">• Forging Successful Strategic Partnerships with Advisors & Teams IMCA Jason Bogardus, Morgan Stanley Private Wealth Management Richard Jones, Merrill Lynch – Private Banking & Investment Group	Raphael

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Issued: January 26th, 2016



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- 2:05 pm - 2:55 pm **CONCURRENT BREAKOUTS CONT'D**
- The Continuity Plan – Positioning Your Team for Long-Term Success **IMCA** DaVinci 1
Jon Goldstein, Ameriprise Financial
Michael O'Neill, Morgan Stanley Private Wealth Management
Anthony Parr, Wells Fargo Advisors, LLC
 - With This Recent Market Volatility... Is It Time to Get More Active? **CFP IMCA** DaVinci 3
Joel Greenblatt, Managing Principal and Co-Chief Investment Officer, Gotham Asset Management
 - Team Roles and Responsibilities – a Benchmarking Solution Tower 3
Judy Beatrice, Executive Leadership Consultant, Hyperion 360 Solutions
 - Five New Year's Resolutions for Investors in 2016 **CFP IMCA** Tower 8
Cynthia Chamberlayne, Director & Portfolio Strategist, Davis Advisors
- 2:55 pm – 3:10 pm Networking Break Tower Ballroom 5
- 3:10 pm – 4:00 pm **CONCURRENT BREAKOUTS**
- You've Been Framed: How to Reframe Your Wealth Management Business and Renew Client Relationships **IMCA** Raphael
Ray Sclafani, President & Founder, ClientWise, LLC
 - Emerging Affluence: Women and Other Niche Clients DaVinci 1
Julia Peloso-Barnes, Morgan Stanley Wealth Management
Wayne Pichon, Wells Fargo Advisors, LLC
Sarah Springer, Wells Fargo Advisors, LLC
 - Hedging Inflation: A Historical Perspective **CFP IMCA** DaVinci 3
Geetesh Bhardwaj, Director of Research, Summerhaven Index Management

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TUESDAY, FEBRUARY 2, 2016

3:10 pm – 4:00 pm	CONCURRENT BREAKOUTS CONT'D	
	<ul style="list-style-type: none">• Adding Value through Behavioral Coaching IMCA Brian Scott, CFA, Senior Investment Strategist, Vanguard Investment Strategy Group• Strategies for Today's Markets CFP IMCA Peter Costa, Governor with the NY Stock Exchange, President of Empire Executions, Inc., and a CNBC Market Analyst	Tower 3 Tower 8
4:00 pm – 4:10 pm	Refreshment Break	Tower Ballroom 5
4:10 pm - 5:00 pm	GENERAL SESSION 10% Happier Dan Harris , Award-winning ABC News Anchor and #1 New York Times Bestselling Author	Tower Ballroom 4
5:00 pm - 6:00 pm	Cocktail Reception	Tower Ballroom 5

WEDNESDAY, FEBRUARY 3, 2016

7:00 am – 11:00 am	Registration/Information Desk	Tower Ballroom Foyer
7:00 am - 8:00 am	Breakfast	Tower Ballroom 5
8:00 am - 8:45 am	GENERAL SESSION The Essential Role a Winning Culture Plays in Team Success Paul Purcell , Chairman & Chief Executive Officer, RW Baird & Co.	Tower Ballroom 4
8:45 am – 9:00 am	Refreshment Break	Tower Ballroom 5

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WEDNESDAY, FEBRUARY 3, 2016

- 9:00 am – 9:50 am **CONCURRENT BREAKOUTS**
- The Anatomy of a Top Team – Structures, Roles & Responsibilities **IMCA** DaVinci 1
Andrew Schultz, Morgan Stanley Wealth Management
Helene Shaw, Client Service Associate, Morgan Stanley Wealth Management
 - Marketing Magnetism: Team-Based Strategies for Generating Significant Net New Business DaVinci 3
Maribeth Kuzmeski, President, Red Zone Marketing
 - Do More for the Core – the Case for Sector Investing **CFP IMCA** Tower 3
Daniel Braz, CFA, VP, Senior Strategist, State Street Global Advisors
 - The Evolution of the Client Service Role Tower 8
Jamie Chmielewski, Practice Administration Manager, Wells Fargo Advisors, LLC
Deanne Soetenga, Assistant Vice President, Senior Client Specialist, RW Baird & Co.
- 9:50 am – 10:00 am Refreshment Break Tower Ballroom 5
- 10:00 am - 10:50 am **CONCURRENT BREAKOUTS**
- Constructing and Managing a Synergistic Team **IMCA** DaVinci 1
Paul Blease, Director, CEO Advisor Institute
 - Multigenerational Appeal – Crafting Your Value Proposition for the Next Generation of Clients DaVinci 3
Brandon Fancher, Wells Fargo Advisors, LLC
Dexter Walker, Morgan Stanley Private Wealth Management
 - Top Analyst Panel: Strategies for Success **CFP IMCA** Tower 3
Bruno Fellin, Director of Portfolio Management, GM Advisory Group
Ricardo Santamaria, Assistant Vice President, Consulting Group Analyst, Graystone Consulting, a business of Morgan Stanley
 - 31 Things You Can Ask Your Assistant to Do and a Few You Shouldn't Tower 8
Bonnie Low-Kramen, Founder, Ultimate Assistant LLC

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WEDNESDAY, FEBRUARY 3, 2016

10:50 am – 11:05 am	Refreshment Break	Tower Ballroom 5
11:05 am – 11:35 am	GENERAL SESSION The 2016 Election and the Investment Implications Greg Valliere , Chief Strategist, Horizon Investments	Tower Ballroom 4
11:35 am	CLOSING REMARKS: Sterling Shea , Associate Publisher, Head of Advisory & Wealth Management Programs, <i>Barron's</i>	Tower Ballroom 4

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