

BARRON'S

# TOP ADVISORY TEAMS SUMMIT

FEB 8-10, 2017 | LAS VEGAS

■ Team Management

■ Financial Planning

■ Business Development

■ Relationship Management

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## WEDNESDAY, FEBRUARY 8, 2017

1:00 pm - 8:00 pm	Check In & Registration	Grand Ballroom Foyer
2:00 pm - 4:00 pm	<b>PRE-CONFERENCE SESSION</b> Proven Strategies for Constructing and Managing a Synergistic Team <b>Paul Blease</b> , Director, CEO Advisor Institute	Monet 2
5:30 pm - 6:30 pm	Cocktail Reception	Grand Ballroom 7
6:30 pm - 8:30 pm	<b>WELCOME DINNER &amp; SPEAKER</b> The Future of the Mind <b>Michio Kaku, Ph.D.</b> , Henry Semat Chair in Theoretical Physics, City Univ. of New York; Science Author and Radio / TV Host	Grand Ballroom 5
8:30 pm - 10:00 pm	<b>AFTER PARTY: TOAST TO THE NEXT GEN</b>	Tower Ballroom 2

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## THURSDAY, FEBRUARY 9, 2017

7:00 am - 6:00 pm	Registration / Information Desk	Grand Ballroom Foyer
7:00 am - 8:00 am	Breakfast	Grand Ballroom 7
8:00 am - 8:10 am	<b>OPENING REMARKS</b> <b>Sterling Shea</b> , Associate Publisher, Head of Wealth Management Programs, <i>Barron's</i>	Grand Ballroom 5
8:10 am - 9:00 am	<b>GENERAL SESSION</b> The Top 5 Disruptions <b>IMCA</b> <b>Paul Hatch</b> , Group Managing Director, Head of Advice & Solutions, UBS Wealth Management Americas	Grand Ballroom 5
9:00 am - 9:15 am	Refreshment Break	Grand Ballroom 7
9:15 am - 10:05 am	<b>CONCURRENT BREAKOUTS</b> <ul style="list-style-type: none"><li>● Lone Ranger to Leader: The Leader's Journey to Transforming Their Business <b>Ray Sclafani</b>, CEO, ClientWise</li></ul>	Monet 2

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Issued: January 30th, 2017

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**THURSDAY, FEBRUARY 9, 2017**

9:15 am - 10:05 am

**CONCURRENT BREAKOUTS CONT'D**

- Enhance Your Digital & Social Media Strategy Monet 4  
**David Armstrong**, Monument Wealth Management  
**Seth Coren**, Morgan Stanley Private Wealth Management
- Client Service of the Future: How to Exceed Expectations Grand Ballroom 1  
**Drew Freides**, UBS Private Wealth Management  
**Tony Maddalena**, Morgan Stanley Wealth Management
- The Language of Change: Creating a Grand Ballroom 3  
Tailwind from DoL **CFP** **IMCA**  
**Gary DeMoss**, Director, Invesco Consulting
- Reverse Mentoring: What You Can Learn From Your Team Grand Ballroom 4  
**AJ Fechter**, Morgan Stanley Private Wealth Management  
**Tom Sedoric**, Wells Fargo Advisors

10:05 am - 10:30 am

Networking Break

10:30 am - 11:20 am

**CONCURRENT BREAKOUTS**

- Interviewing for High-Performers that Fit Your Culture & Position Monet 2  
**Fran Skinner**, Co-Founder, AUM Partners, LLC
- Taking Your Team to New Heights: How to Build Monet 4  
and Manage an Elite Team  
**Robert Milliman**, Western Divisional Sales Manager, First Eagle
- Managing Performance Expectations in a Lower Grand Ballroom 1  
Return Environment **CFP** **IMCA**  
**Eric Fujimoto**, Ameriprise Financial  
**Bill Grous**, Alex. Brown, a division of Raymond James
- Upward Bound: Implementing Strategic Insights Grand Ballroom 3  
to Achieve Investor Goals **CFP** **IMCA**  
**Jim McDonald**, Executive VP & Chief Investment Strategist,  
Northern Trust

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10:30 am - 11:20 am	<b>CONCURRENT BREAKOUTS CONT'D</b>	
	<ul style="list-style-type: none"> <li>● The Future of Advice: The Realities and Expectations for Next Generation Advisors Moderated By: <b>Steve Samuels</b>, Managing Director, Client Segments and Advisor Development, Bank of America Merrill Lynch <b>Chad Bester</b>, Wells Fargo Advisors <b>Rees Mason</b>, Merrill Lynch Wealth Management <b>Brandon Schlesinger</b>, Morgan Stanley Private Wealth Management</li> </ul>	Grand Ballroom 4
11:20 am - 11:35 am	Refreshment Break	Grand Ballroom 7
11:35 am - 12:25 pm	<b>GENERAL SESSION</b> Macro Risks and Opportunities in Today's Market   Moderated By: <b>Darrell Cronk</b> , President of Wells Fargo Investment Institute & Chief Officer for Wealth and Investment Management, Wells Fargo & Company <b>David Hoag</b> , Fixed Income Portfolio Manager, Capital Group home of American Funds <b>Eric Veiel</b> , Head of U.S. Equity, T. Rowe Price	Grand Ballroom 5
12:25 pm - 1:30 pm	<b>LUNCH</b>	Grand Ballroom 5
1:30 pm - 1:45 pm	Refreshment Break	Grand Ballroom 7
1:45 pm - 2:35 pm	<b>CONCURRENT BREAKOUTS</b>	
	<ul style="list-style-type: none"> <li>● Perfecting Your Team Structure &amp; Strategy <b>Kevin Myeroff</b>, NCA Financial Planners <b>Frank Seminara</b>, Morgan Stanley Private Wealth Management</li> <li>● Total Team Marketing in the Age of Commoditization <b>Andrew Burish</b>, UBS Financial Services, Inc.</li> <li>● Elevating the Client Experience &amp; Creating Loyalty for Life <b>Eric Sheikowitz</b>, Founder &amp; Senior Managing Partner, Focus Partners <b>Michael Silver</b>, Founder &amp; Senior Managing Partner, Focus Partners</li> <li>● Reframing Investor Choices: Right Mindset Wrong Market   <b>Garrett Harbron</b>, Investment Analyst, Vanguard</li> </ul>	Monet 2 Monet 4 Grand Ballroom 1 Grand Ballroom 3

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1:45 pm - 3:15 pm	<b>Best Practices Peer Share</b> Please come prepared to discuss the most pressing issue you are facing in your role currently. You will have the opportunity to discuss, share ideas, and learn from peers in a small discussion group setting. No pre-registration required.	Grand Ballroom 4
2:35 pm - 2:50 pm	Refreshment Break	Grand Ballroom 7
2:50 pm - 3:40 pm	<b>CONCURRENT BREAKOUTS</b>	
	<ul style="list-style-type: none"> <li>● The Anatomy of a Top Team: Cassaday &amp; Company <b>Stephan Cassaday</b>, President &amp; CEO <b>Chad Cassaday</b>, Director of Information Technology <b>Kristen Cunningham</b>, Director of Marketing &amp; Communications <b>Sarah Mouser</b>, Director of Financial Planning <b>Linda Stewart</b>, Director of Client Service Monet 2</li> <li>● How to Create an Effective Team Culture <b>Marcos Cigagna</b>, Wells Fargo Advisors <b>Cheryl Young</b>, Morgan Stanley Wealth Management Monet 4</li> <li>● The Best Defense is a Good Offense: Multi-Generational Wealth Management Strategies to Grow and Protect Your Practice <b>John Cianciulli</b>, President, Team Edge Consulting Grand Ballroom 1</li> <li>● Will the Bull Market Make It to Its 8th Birthday? And Other Questions Investors Are Asking Today   <b>Christopher Davis</b>, Chairman &amp; Portfolio Manager, Davis Advisors Grand Ballroom 3</li> </ul>	
3:40 pm - 3:55 pm	Refreshment Break	Grand Ballroom 7
4:00 pm - 5:00 pm	<b>GENERAL SESSION</b> Moderated By: <b>Tricia Kasner</b> , Managing Director, Marketing & Conferences, <i>Barron's</i> <b>Daved Diggs</b> , Tony and Grammy Award Winning Actor for the musical HAMILTON	Grand Ballroom 5
5:00 pm - 6:00 pm	Cocktail Reception	Grand Ballroom 7

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**FRIDAY, FEBRUARY 10, 2017**

7:00 am - 11:00 am	Registration / Information Desk	
7:00 am - 8:00 am	Breakfast	Grand Ballroom 7
8:00 am - 8:50 am	<b>GENERAL SESSION</b> Peers to Partners: How to Leverage and Engage Your Advisor Network <b>IMCA</b> Moderated By: <b>Sterling Shea</b> , Associate Publisher, Head of Wealth Management Programs, Barron's <b>James Atwood</b> , Merrill Lynch - Private Banking & Investment Group <b>Phil Scott</b> , Merrill Lynch Wealth Management <b>John Ver Bockel</b> , Merrill Lynch - Private Banking & Investment Group	Grand Ballroom 5
8:50 am - 9:00 am	Refreshment Break	Grand Ballroom 7
9:00 am - 9:50 am	<b>CONCURRENT BREAKOUTS</b>	
	● Teams in Transition: Steps to Building a Team Today <b>Thomas Brady</b> , Wells Fargo Advisors <b>Melissa Roessler</b> , Wells Fargo Advisors	Monet 2
	● Organic Growth: Strategies for a Sustainable Long Term Business <b>Franco Estrada-Velasco</b> , UBS Financial Services, Inc. <b>Melissa Spickler</b> , Merrill Lynch Wealth Management	Monet 4
	● Motivation - The Hidden Variable for Performance <b>CFP</b> <b>Mirtha Kastrapeli</b> , Vice President, Senior Research Analyst, State Street Center for Applied Research	Grand Ballroom 1
	● Inflationary Expectations and the Value Proposition of Commodities <b>CFP</b> <b>IMCA</b> <b>Geetesh Bhardwaj</b> , Executive Director of Research, SummerHaven Index Management.	Grand Ballroom 3
9:50 am - 10:00 am	Refreshment Break	Grand Ballroom 7
10:00 am - 10:50 am	<b>CONCURRENT BREAKOUTS</b>	
	● Succession & Continuity Planning for Your Business <b>CFP</b> <b>Don d'Adesky</b> , Raymond James <b>Vaughan Scott</b> , Wells Fargo Advisors	Monet 2

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**FRIDAY, FEBRUARY 10, 2017**

10:00 am - 10:50 am

**CONCURRENT BREAKOUTS CONT'D**

- Promoting from Within & Empowering Employees Monet 4  
**Deborah Howard**, Merrill Lynch Wealth Management  
**Andrew Schultz**, Morgan Stanley Wealth Management  
**James Wallace**, Merrill Lynch Wealth Management
- Healthcare & Retirement: Equipping Financial Advisors for Today & Providing a Plan for Tomorrow **CFP** **IMCA** Grand Ballroom 1  
**Peter Stahl**, President, Bedrock Business Results, LLC
- 5 Key Questions for Factor Investors **CFP** **IMCA** Grand Ballroom 3  
**Rob Bush**, ETF Strategist, Deutsche Asset Management

10:50 am - 11:00 am

Refreshment Break

Grand Ballroom 7

11:00 am - 11:40 am

**GENERAL SESSION**

The New Science of Stress: What Applied Neuroscience Teaches Us About Extraordinary Teams  
**Heidi Hanna**, Founder, Chief Energy Officer, Synergy

Grand Ballroom 5