



Feb 4-6
2019

BARRON'S TEAMS SUMMIT | THE BELLAGIO, LAS VEGAS

- Team Management
- Business Development
- Relationship Management
- Financial Planning

MONDAY, FEBRUARY 4, 2019

1:00 PM – 8:00 PM

REGISTRATION

2:00 PM – 4:00 PM

PRE-CONFERENCE SESSION

Raphael 1

New Business Development: Creating Capacity to Grow Your Business
Paul Blease, Director of CEO Advisor Institute, OppenheimerFunds
Paul Brunswick, Senior Business Consultant, OppenheimerFunds

4:10 PM – 5:00 PM

PRE-CONFERENCE SESSION

Raphael 1

Financial Education for the Next Generation
Joe Matina, UBS Financial Services Inc.
Moderator: **Joe Lanza**, Director, Financial Literacy and Education, Dow Jones

5:30 PM – 6:30 PM

COCKTAIL RECEPTION

6:30 PM – 8:30 PM

WELCOME DINNER & SPEAKER

Tower 4

Accelerated Growth: Building Organizations and Teams Capable of Sustaining Growth Through a Culture of Innovation, Courageous Leadership, and Aligned Individuals
Peter Sheahan, Best Selling Author and World Renowned Speaker on Exploiting Business Trends and New Market Opportunities; Founder and CEO, Karrikins Group

TUESDAY, FEBRUARY 5, 2019

7:00 AM – 5:00 PM

REGISTRATION

Breakfast

8:00 AM – 8:50 AM

GENERAL SESSION

Tower 4

The Most Important Thing: What Matters Most For Greater Happiness, Stronger Teams, and Faster Growth
Andrew Bernstein, CEO, Resilience Academy



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8:50 am – 9:05 AM

REFRESHMENT BREAK

9:05 AM – 11:00 AM

Da Vinci 3

MASTER CLASS

Shift Your Human Capital Perspective: Recruit, Retain and Reward Talent like an Asset Rather Than a Liability

Ray Sclafani, CEO, ClientWise

9:05 AM – 9:55 AM

Raphael 1

BREAKOUTS

- Finding, Hiring, and Training Future Financial Planning Team Members

Bob Casarona, Financial Advisor, NCA Financial Planners

David Kurtz, Senior Financial Advisor, NCA Financial Planners

Kevin Myeroff, Chief Executive Officer and President, NCA Financial Planners

Elizabeth Scheiderer, Senior Financial Advisor, NCA Financial Planners

Da Vinci 1

- Future-izing Portfolios: Leveraging Machine Learning for a New Sector Investment Reality

Matthew Bartolini, Head of SPDR Americas Research, State Street Global Advisors

Tower 8

- Client Engagement & Efficiency in the Digital Age

Michael Dunn, Merrill Lynch Wealth Management

Leigh Emery, Chief Compliance Officer for the Dynasty Network, Dynasty Financial Partners

Moderator: **Steve Garmhausen**, Editor, Barron's Advisor Center

Raphael 3

- The Influence of the Business Cycle: Which Factors Outperform When?

Alessio de Longis, CFA, Co-Head and Portfolio Manager, Global Multi-Asset Team, OppenheimerFunds

Mo Haghbin, CFA, Head of Product, Beta Solutions, OppenheimerFunds

9:55 AM – 10:10 AM

REFRESHMENT BREAK



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10:10 am – 11:00 AM

Raphael 1

BREAKOUTS

- Assembling a Top Team to Create Scalability

Rachel Boyell, Director of Investment Strategy & Operations, Cassaday & Company, Inc.

Stephan Cassaday, Chairman and CEO, Cassaday & Company, Inc.

Allison Felix, Principal, President & COO, Cassaday & Company, Inc.

Sarah Mouser, Director of Financial Planning, Cassaday & Company, Inc.

Michelle Tigani, Marketing & Communications Manager, Cassaday & Company, Inc.

Da Vinci 1

- Navigating Global Disruptive Forces

Chris Dillon, Investment Specialist, Multi-Asset Division, T. Rowe Price

Matthew Ko, Investment Specialist, Multi-Asset Division, T. Rowe Price

Jason White, Portfolio Specialist, International Equity, T. Rowe Price

Tower 8

- Family Governance: What Top 3 Questions Keep UHNW Clients Up at Night?

Stacy Allred, Managing Director and Head, Ultra High Net Worth Strategic Wealth Advisory Group and Center for Family Wealth Dynamics and Governance, Merrill Lynch

Valerie Galinskaya, Director, Center for Family Wealth Dynamics and Governance, Merrill Lynch

Raphael 3

- Understanding and Replicating Private Equity: High Returns, Low Risk, and Low Fees

Geetesh Bhardwaj, Managing Director in Research, SummerHaven Index Management

11:00 AM – 11:15 AM

REFRESHMENT BREAK



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11:15 AM – 12:00 PM

Tower 4

GENERAL SESSION

Navigating A Shifting Market: Ignoring the Noise and Focusing on Fundamentals

Matt McLennan, Head of Global Value Team, First Eagle Investment Management

Interviewer: **Paul Hatch**, Group Managing Director and Northeast Division Director for Wealth Management USA, UBS Financial Services Inc.

12:00 PM – 1:00 PM

LUNCH

1:00 PM – 1:45 PM

Tower 4

GENERAL SESSION

Realities, Myths, and Actionable Ideas in Fixed Income

Mike Gitlin, Head of Fixed Income at Capital Group, home of American Funds

Interviewer: **A.J. Fechter**, Morgan Stanley Private Wealth Management

1:45 PM – 2:00 PM

REFRESHMENT BREAK

2:00 PM – 3:45 PM

Da Vinci 3

MASTER CLASS

Website & Brand Masterclass: Product Design, User Experience, and Messaging

Ryan Daly, Senior Product Manager, Barron's

Max Deirmenjian, Audience Development Manager, Dow Jones

Mark Staples, Managing Director, Wells Fargo Advisors

Terri Trespicio, Writer, Branding Consultant, and Co-Creator of Lights, Camera, Expert

2:00 PM – 2:50 PM

Raphael 1

BREAKOUTS

- Shrinking to Grow: How to Grow Your Practice with Fewer Clients

Karl Lorenz, Merrill Lynch Wealth Management



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Da Vinci 1

- Fostering New Business Growth Through an Effective Marketing Campaign

Louise Armour, Managing Director and Portfolio Manager, JP Morgan Securities
Rosa Rita, Managing Director and Chief Marketing Officer, JP Morgan Securities

Tower 8

- Segmenting Teams, Clients and Centers of Influence Based on Sales Personality

Amy Parvaneh, Founder and CEO, Select Advisors

Raphael 3

- Emerging Markets in The Return of Volatility

David Dali, Portfolio Strategist, Matthews Asia
Daniel Grana, Portfolio Manager, Emerging Market Equities, Putnam Investments
Richard "Crit" Thomas, Global Market Strategist, Touchstone Investments
Moderator: **Todd Silaika**, Merrill Lynch Wealth Management

2:50 PM – 3:05 PM

REFRESHMENT BREAK

3:05 PM – 3:55 PM

BREAKOUTS

Raphael 1

- Succession: Creating the Next Generation of Leaders on Your Team

Barbara Archer, Hightower Advisors
Dana Jackson, Graystone Consulting, a business of Morgan Stanley
Moderator: **Amy Parvaneh**, Founder and CEO, Select Advisors

Da Vinci 1

- The 5 Must-Do's for Every Team to Run Their Practice Like a Business

Craig Schwartz, Wells Fargo Advisors
Eric Sheikowitz, Founder and Managing Partner, Focus Partners
Michael Silver, Founder and Managing Partner, Focus Partners
Mark Switow, UBS Financial Services Inc.

Tower 8

- Strategic Teaming to Serve an Aging Population

Howard Krooks, Partner, Elder Law Associates
Jill Poser-Kammet, Director of Life Care Planning, AdvoCare
Moderator: **Beverly Flaxington**, Founder, The Collaborative



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Raphael 3

- The Overlooked Gap in Financial Advice
Joanna McNamara, Vice President and Head of Partnerships, Chubb
North America Personal Risk Services

3:55 PM – 4:10 PM

REFRESHMENT BREAK

4:10 PM – 5:00 PM

GENERAL SESSION

Tower 4

Grit and Determination in the Face of Adversity
Jim Kelly, Hall of Fame Quarterback, Best-Selling Author, Motivational
Speaker

5:00 PM – 6:00 PM

COCKTAIL RECEPTION

WEDNESDAY, FEBRUARY 6, 2019

7:00 AM – 11:00 AM

REGISTRATION

Breakfast

8:00 AM – 8:40 AM

GENERAL SESSION

Tower 4

"TOMORROWVISION 2038": 5 Fierce Forces Transforming Your
Consumer
Faith Popcorn, Founder & CEO, Faith Popcorn's BrainReserve

8:40 AM – 8:55 AM

REFRESHMENT BREAK

8:55 AM – 9:45 AM

BREAKOUTS

Tower 8

- Defining Roles and Responsibilities on Your Team
David Berdon, Morgan Stanley Private Wealth Management
Rachel Gottlieb, UBS Financial Services Inc.
William Rose, UBS Financial Services Inc.
Mark Seruya, Morgan Stanley Private Wealth Management



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Da Vinci 1

- High-Net-Worth Wealth Trends: Referral Strategies for Growth
David Friedman, Co-Founder, WealthQuotient

Da Vinci 3

- Servicing the Next Generation of Investors
Sharon Cunningham, Morgan Stanley Wealth Management
Hilary Doherty, RBC Wealth Management
Lucas Winthrop, Winthrop Wealth Management
Moderator: **Christian Mitchell**, Senior Vice President – Investment Products & Services, Northwestern Mutual

Donatello 3

- Active Management – Why it is Especially Important in this Environment
Laird Bieger, Vice President, Portfolio Manager, Baron Funds
Anmol Sinha, Senior Vice President and Strategist, PIMCO
Moderator: **Steven Grill**, Alex Brown. A division of Raymond James

9:45 AM – 9:55 AM

REFRESHMENT BREAK

9:55 AM – 10:45 AM

BREAKOUTS

Da Vinci 3

- "You got IQ. What about JQ?" Judgment and Choice Making in Uncertainty
Krishna Pendyala, Founder and Chief Empowerment Officer, ChoiceLadder Institute

Tower 8

- Developing a Path for Female Leaders on Your Team
Marcos Cigagna, Wells Fargo Advisors
Yahaira Fernandez, Wells Fargo Advisors

Da Vinci 1

- T.E.A.M. Dynamics - Understanding Core Personality Types
Speaker TBA

Donatello 3

- Ways to Generate Income and Manage Volatile Markets
Jonathan Mondillo, Senior Investment Manager, Fixed Income, Aberdeen Standard Investments
Katy Nuss, Fixed Income Client Portfolio Manager, Columbia Threadneedle Investments
Moderator: **Mark Walker**, Ameriprise Financial Services, Inc.



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REFRESHMENT BREAK

10:55 AM – 11:35 AM

GENERAL SESSION

Tower 4

Pushing the Envelope: Harnessing the Headwinds of Change
Nicole Malachowski, First Female Thunderbird Pilot