

## Insider's Forum 2017 - Schedule of Events

### Wednesday, September 6th Pre-Conference Workshops

TIME				
8:00AM - 12:20PM	9:00AM-12PM Workshop #1 - "Four Point Plan: The Most Direct Path to Building a \$1B Firm" Workshop - Angie Herbers, FourPointe Consulting	4 Workshops To Be Announced - 8:00-8:50/9:10-10:00/10:20-11:10/11:30-12:20	4 Workshops To Be Announced - 8:00-8:50/9:10-10:00/10:20-11:10/11:30-12:20	

### Wednesday, September 6th Conference Sessions

TIME				
1:30PM - 2:45PM (75 minutes)	Breakout #1 - "Structuring Internal Equity Transitions - Pros & Cons of Various Approaches" - Roy Ballentine, Ballentine Partners	Breakout #2 - Cybersecurity Panel - Speakers To Be Announced	Breakout #3 - Investment Panel - Speakers To Be Announced	Breakout #4 - "The Constructive Use of Disruption" - Susan Bradley, Sudden Money Institute
2:45PM-3:45PM	<i>Meet &amp; Greet - Exhibit Hall - Broadway Ballroom West</i>			
4:00PM-5:00PM (60 minutes)	Announcements & Opening Keynote - "The New Profession" - Bob Veres, Inside Information			
	Broadway Ballroom East			
5:00PM - 6:30PM	<i>Opening Cocktail Reception &amp; Networking - in the Exhibit Hall Broadway Ballroom West</i>			
6:30PM -9:00PM	<i>Live Music Event with Food &amp; Drink - Broadway West Prefunction</i>			

### Thursday, September 7th Conference Sessions

TIME	
7:30AM - 8:30AM	<i>Breakfast - Broadway West Prefunction</i>
8:45AM-10:00AM (75 minutes)	Announcements, Introductions & Keynote #2 - "Developing Your Firm's Next Generation Leaders" - Philip Palaveev, The Ensemble Practice
	Broadway Ballroom East
10:00AM -11:00AM	<i>Networking in Exhibit Hall - Broadway Ballroom West</i>

11:00AM -12:15PM (75 minutes)	<b>Breakout #5 - Client Service Models - Speakers To Be Announced</b>	<b>Breakout #6 - "Technology Trends &amp; Threats: What You Need to Know &amp; Do" - Joel Bruckenstein, T3</b>	<b>Breakout #7 - "Designing Processes for Growing Your Firm: how to create and implement new workflows and processes and how to create a culture that embraces and evolves processes" - Cheryl Holland, Bethany Griffin &amp; Scotty Scott, Abacus Planning Group</b>	<b>Breakout #8 - "When &amp; How to Creatively &amp; Effectively Recruit, Vet &amp; Hire Your Human Talent" - Luke Dean, UVU+Ginny Hudgens, The Strategic Implementer+Hunter Judson, Jr., The Judson Group</b>
12:15PM - 1:30PM	<i>Lunch with Roundtable Discussions - Broadway West Prefunction</i>			
1:30PM - 2:45PM (75 minutes)	<b>Breakout #9 - Creating the Client Experience - Speakers To Be Announced</b>	<b>Breakout #10 - "Compliance Tools, Resources &amp; Current Issues?" - Tom Giachetti, Stark &amp; Stark+Tom Harms, Summit Trail Advisors</b>	<b>Breakout #11 - To Be Announced</b>	<b>Breakout #12 - To Be Announced</b>
3:00PM - 3:50PM (50 minutes)	<b>Breakout #13 - To Be Announced</b>	<b>Breakout #14 - "3 Strategies To Select the Right Technology" - Jo Day, Trumpet</b>	<b>Breakout #15 - To Be Announced</b>	<b>Breakout #16 - "Ditch the Elevator Pitch: Distill &amp; Leverage Memorable Messaging with "Snackable Content" " - Megan Carpenter, FiComm Partners</b>
3:50PM - 4:50PM	<i>Networking in Exhibit Hall - Broadway Ballroom West</i>			
4:50PM- - 4:55PM	<b>Announce 2017 Insider's Forum Leadership Award</b>			
4:55PM-5:55PM (60 minutes)	<b>Keynote #3 - "The 12 Most Important Things I've Learned About Managing an Advisory Business" Roy Ballentine, Ballentine Partners</b>			
	<b>Broadway Ballroom East</b>			
<b>Friday, September 8th Conference Sessions</b>				

**TIME**

8:30AM-9:20AM (50 minutes)	<b>Keynote #4 - To Be Announced - Broadway Ballroom E</b>
9:20AM-10:35AM	<i>Networking in Exhibit Hall - Broadway Ballroom West</i>

10:35AM - 11:25PM (50 minutes)	<b>Breakout #17.2 - How to Structure Your Fees in Light of the Cost of Delivery - Speakers To Be Announced</b>	<b>Breakout #18 - "The 401(k) Marketplace: Opportunities for Advisors" - Steven Kaye, AEPG</b>	<b>Breakout #19 - "Family Dynamics When Money is Moving: Learn How to Identify Issues &amp; Guide Discussions" - Peggy Frye, Glenayr Wealth, LLC</b>	<b>Breakout #20 - To Be Announced</b>
11:30PM -1:00PM (90 minutes)	<b><i>Lunch &amp; Keynote #5 - " Veres+Herbers: Unplugged &amp; Unscripted" - Angie Herbers, FourPointe Consulting &amp; Bob Veres, Inside Information</i></b>			
1:00PM-1:15PM	<b>Conference Wrap Up - Broadway Ballroom E</b>			
<b>Friday, September 8th Post-Conference Workshop</b>				

<b>TIME</b>	
2:00PM - 5:00PM	<b>Susan Bradley's CeFT Workshop</b>