

## Insider's Forum 2017 - Schedule of Events

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

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

### Wednesday, September 6th Conference Sessions

TIME				
1:30PM - 2:45PM (75 minutes)	<b>Breakout #1 - "Structuring Internal Equity Transitions - Pros &amp; Cons of Various Approaches" - Roy Ballentine, Ballentine Partners</b>	<b>Breakout #2 - "Technology Trends &amp; Threats: What You Need to Know &amp; Do" - Joel Bruckenstein, T3</b>	<b>Breakout #3 - Investment Panel - Speakers To Be Announced</b>	<b>Breakout #4 - "The Constructive Use of Disruption" - Susan Bradley, Sudden Money Institute</b>
<b>Target Audience</b>	<b>CEOs</b>	<b>COOs</b>	<b>CFPs</b>	<b>All</b>
2:45PM-3:45PM	<i>Meet &amp; Greet - Exhibit Hall - Broadway Ballroom West</i>			
4:00PM-5:00PM (60 minutes)	<b>Announcements &amp; Opening Keynote - "The New Profession" - Bob Veres, Inside Information</b>			
	<b>Broadway Ballroom East</b>			
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)	<b>Introductions &amp; Keynote #2 - "Developing Your Firm's Next Generation Leaders" - Philip Palaveev, The Ensemble Practice</b>
	<b>Broadway Ballroom East</b>
10:00AM -11:00AM	<i>Networking in Exhibit Hall - Broadway Ballroom West</i>

11:00AM -12:15PM (75 minutes)	<b>Breakout #5 - "How to Profitably Evolve Your Client Service Models to Serve Your Future Great Clients"- Alison Scherr, Kahler Financial Group+TBA</b>	<b>Breakout #6 - Cybersecurity Panel - Speakers To Be Announced</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 Griffith &amp; Scotty Scott, Abacus Planning Group</b>	<b>Breakout #8 - "The Crazy World of Health Care Reform" - Carolyn McClanahan</b>
<b>Target Audience</b>	<b>CEOs+COOs</b>	<b>CEOs+COOs</b>	<b>CEOs+COOs</b>	<b>CFPs</b>
12:15PM - 1:30PM	<i>Lunch with Roundtable Discussions - Broadway West Prefunction</i>			
1:30PM - 2:45PM (75 minutes)	<b>Breakout #9 - "Life Without Limits" - Stephanie Bogan</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 - "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>
<b>Target Audience</b>	<b>All</b>	<b>COOs</b>		<b>CEOs+COOs</b>
3:00PM - 3:50PM (50 minutes)	<b>Breakout #13 - "Ditch the Elevator Pitch: Distill &amp; Leverage Memorable Messaging with "Snackable Content" " - Megan Carpenter, FiComm Partners</b>	<b>Breakout #14 - "3 Strategies that Eliminate Mistakes When Selecting New Technology" - Jo Day, Trumpet</b>	<b>Breakout #15 - Topic To Be Announced, Rich Cancro, AdvisorEngine</b>	<b>Breakout #16 - Topic To Be Announced, Raef Lee, SEI</b>
<b>Target Audience</b>	<b>CEOs+CFPs</b>	<b>CEOs+COOs</b>		
3:50PM - 4:50PM	<i>Networking in Exhibit Hall - Broadway Ballroom West</i>			
4:50PM-5:50PM (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 - "Alternative Fee Structures for Revenue Growth" - Matthew Jackson, Simon-Kucher &amp; Partners</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>
<b>Target Audience</b>	<b>CEOs+COOs</b>	<b>CEOs+CFPs</b>	<b>All</b>	
11:30PM - 1:00PM (90 minutes)	<b>Lunch &amp; Keynote #5 - "Veres+Herbers: Unplugged &amp; Unscripted" - Angie Herbers, FourPointe Consulting &amp; Bob Veres, Inside Information</b>			
	<b>Broadway Ballroom E</b>			
1:00PM-1:15PM	<b>Conference Wrap Up - Broadway Ballroom E</b>			

**Friday, September 8th Post-Conference Workshop**

<b>TIME</b>	
2:00PM - 5:00PM	<p><b>Susan Bradley's CeFT® Workshop.</b>  This Financial Transitionist® Workshop is a one-day event led by SMI faculty that introduces the scholarship (inneuroscience, psychology, sociology, and adaptive leadership) underpinning the work of the Financial Transitionist®. It provides an overview of the processes, tools, skill set and qualities of the Financial Transitionist® as well as introduces two primary tools. Those tools are presented with case studies and include role play, preparing attendees for practical application immediately following the workshop. This workshop is open to everyone; it has no prerequisites.</p> <ul style="list-style-type: none"> <li>•3 hours of CFP CE</li> <li>•Experiential learning</li> <li>•Practical tools and proven methodology for financial transitions management</li> <li>•A deep dive into two primary tools of the Financial Transitionist®</li> </ul> <p>REGISTER HERE: <a href="https://www.suddenmoney.com/index.cfm?fuseaction=eventregistration.register&amp;step=1">https://www.suddenmoney.com/index.cfm?fuseaction=eventregistration.register&amp;step=1</a></p>
<b>Target Audience</b>	<b>All</b>