

## Insider's Forum 2017 - Schedule of Events

Wednesday, September 6th Pre-Conference Workshop & Sessions				
TIME				
8:00AM - 12:20PM	(\$549 cost for this workshop) 9:00AM-12PM "The Four Point Plan: The Most Direct Path to Building a \$1B Firm" Workshop - Angie Herbers, FourPointe Consulting	COMPLIMENTARY PRE-CONFERENCE SESSIONS 9:10-10AM "Micro-targeting Marketing" – Kristen Luke, Kaleido Creative 10:20-11:10AM "Why All the Buzz About Reverse Mortgages?" - Tim Jackson, Reverse Mortgage Funding 11:30AM-12:20PM "Solving the Most Common Disability Income Insurance Challenges" - John Ryan, RISC		COMPLIMENTARY PRE-CONFERENCE SESSIONS 9:10-10AM "The Future of Client Engagement is Visual Collaboration" - Adam Holt, Asset-Map 10:20-11:10AM "Full-Family Financial Planning" - Harris Scher, Everplans 11:30AM-12:20PM "DOL Fiduciary Rule Compliance" - Daniel Satchkov, RiXtrema
<i>Target Audience</i>	<i>CEOs+Operations</i>	<i>CEOs+Advisors</i>		<i>Operations+Advisors</i>
Wednesday, September 6th Conference Sessions				
TIME				
1:30PM - 2:45PM (75 minutes)	Breakout #1 - "Technology Trends & Threats: What You Need to Know & Do" - Joel Bruckenstein, T3	Breakout #2 - "Structuring Internal Equity Transitions - Pros & Cons of Various Approaches" - Roy Ballentine, Ballentine Partners	Breakout #3 - "When Active Outperforms" - David Marcus, Evermore+Jason White, T. Rowe Price+Michael Shaoul, Marketfield+Gary Miller, Frontier Asset Management+Bob Veres, Inside Information (moderator)	Breakout #4 - "The Constructive Use of Disruption" - Susan Bradley, Sudden Money Institute
<i>Target Audience</i>	<i>All</i>	<i>CEOs</i>	<i>Advisors</i>	<i>All</i>
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			
	<i>Broadway Ballroom East</i>			
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)	Student Introductions & Keynote #2 - "G2: Developing Your Firm's Next Generation of Leaders" - Philip Palaveev, The Ensemble Practice			
	<i>Broadway Ballroom East</i>			
10:00AM - 11:00AM	<i>Networking in Exhibit Hall - Broadway Ballroom West</i>			
11:00AM -12:15PM (75 minutes)	Breakout #5 - "How to Profitably Evolve Your Client Service Models to Serve Your Future Great Clients"- Alison Scherr, Kahler Financial Group+Brad Felix, Truepoint Wealth Counsel+Jean Sinclair, Avenue Advisors (moderator)	Breakout #6 - "The Crazy World of Health Care Reform" - Carolyn McClanahan	Breakout #7 - "Managing Outside the Box: Why to Consider Hiring from Outside the Profession" - Chris Emert, Matter Family Office+Channing Hussey, Mosaic Financial Partners+Barrett Karvis, Edge Capital Partners+ Lisa Crafford, PAS (moderator)	Breakout #8- "Designing Processes for Growing Your Firm" - Cheryl Holland, Bethany Griffith & Scotty Scott, Abacus Planning Group

Target Audience	CEOs+Operations	Advisors	CEOs+Operations	Operations
12:15PM - 1:30PM	<i>Lunch with Roundtable Discussions - Broadway West Prefunction</i>			
1:30PM - 2:45PM (75 minutes)	Breakout #9 - "Practice Protection: How to Successfully Complete a Regulatory Examination" - Tom Giachetti, Stark & Stark+ Tom Harms, Summit Trail Advisors+Kim Brown, JNBA Financial Advisors	Breakout #10 - "Life Without Limits" - Stephanie Bogan	Breakout #11- "Creative & Effective Recruiting, Vetting & Hiring for Your Human Talent" - Luke Dean, UVU+Ginny Hudgens, The Strategic Implementer+Hunter Judson, Jr., The Judson Group+Shaun Kapusinski, Sequoia Financial Group (moderator)	Breakout #12 - Emerging Business & Technology Resource TED Talks - 1) John Mackowiak for Advyzon 2) Jay Michel for CircleBlack 3) Gary Zimmerman for MaxMyInterest 4) Wes Stillman for RightSize Solutions 5) Daniel Satchkov for RiXtrema 6) Steve Ambuul for Asset-Map, 7) Harris Scher for Everplans, plus Marie Swift, Impact Communication (Emcee)
Target Audience	Operations	All	CEOs+Operations	All
3:00PM - 3:50PM (50 minutes)	Breakout #13 - "Ditch the Elevator Pitch: Distill & Leverage Memorable Messaging with "Snackable Content" " - Megan Carpenter, FiComm Partners	Breakout #14 - "The Purposeful Advisory Firm" - Raef Lee, SEI	Breakout #15 - "The Platform of the Future" - Rich Cancro, AdvisorEngine & Bob Veres, Inside Information	Breakout #16 - "3 Strategies that Eliminate Mistakes When Selecting New Technology" - Jo Day, Trumpet
Target Audience	All	CEOs	All	Operations
3:50PM - 4:50PM	<i>Networking in Exhibit Hall - Broadway Ballroom West</i>			
4:50PM-5:50PM (60 minutes)	Keynote #3 - "The 12 Most Important Things I've Learned About Managing an Advisory Business" Roy Ballentine, Ballentine Partners			
<b>Friday, September 8th Conference Sessions</b>				
<b>TIME</b>				
7:30AM - 8:30AM	<i>Breakfast Buffet - Broadway Ballroom East</i>			
8:30AM-9:20AM (50 minutes)	Keynote #4 - "Change is Near: How Data & Future Technology will Shift Financial Services" - Danielle Fava, TD Ameritrade Institutional			
9:20AM-10:35AM	<i>Networking in Exhibit Hall - Broadway Ballroom West</i>			
10:35AM - 11:25AM (50 minutes)	Breakout #17 - "Alternative Fee Structures for Revenue Growth" - Matthew Jackson, Simon-Kucher & Partners	Breakout #18 - "Navigating the Post-DOL 401(k) Marketplace" - Steven Kaye, AEPG	Breakout #19 - "Family Dynamics When Money is Moving: Learn How to Identify Issues & Guide Discussions" - Peggy Frye, Glenayr Wealth, LLC	Breakout #20 - "HIFON - The National Study Group for Operations Professionals" - Shaun Kapusinski, Sequoia Financial Group
Target Audience	CEOs+Operations	CEOs+Operations	Advisors	Operations
11:30AM -1:00PM (90 minutes)	<i>Lunch &amp; Keynote #5 - " Veres+Herbers: Unplugged &amp; Unscripted" - Angie Herbers, FourPointe Consulting &amp; Bob Veres, Inside Information</i>			
<b>Broadway Ballroom East</b>				
1:00PM-1:15PM	Conference Wrap Up - Broadway Ballroom East			

<b>Friday, September 8th Post-Conference Workshop</b>				
<b>TIME</b>				

1:15PM - 4:15PM

**Susan Bradley's CeFT® Workshop. DISCOUNTED RATE OF \$290 FOR INSIDER'S FORUM ATTENDEES**  
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.

- 3 hours of CFP CE
- Experiential learning
- Practical tools and proven methodology for financial transitions management
- A deep dive into two primary tools of the Financial Transitionist®

REGISTER HERE: <https://www.suddenmoney.com/index.cfm?fuseaction=eventregistration.register&step=1>

**Target Audience**

*All*