

Insider's Forum 2021 - Schedule of Events

Time	Wednesday, October 6th - Pre-Conference Workshops & Conference Sessions	
8:30AM - 11:30AM	HIFON Meeting led by Shaun Kapusinski, HIFON Founder 1) "How to Run a World Class Technology Program" - Chris Emert, CJE Tech Partners 2) "Growing Your Organization & Your Career Through Operations." - Kara Armstrong, CapSouth Wealth Management 3) "What Do You Need to Create Sustainable Growth?" - Shauna Mace, Shauna Mace LLC	
	<i>Operations (HIFON current & potential members)</i>	
11:30AM - 12:30PM	<i>Lunch</i>	
12:30PM - 1:20PM (50 minutes)	Breakout #1 - "Developing a Marketing Strategy Plus Effective Video & Podcast Execution" - Candice Carlton, FiComm Partners+Kate Holmes, Innovating Advice	Breakout #2 - "How To Prepare for a Merger or Acquisition as a Buyer or a Seller" - David Grau, Jr., Succession Resource Group
	<i>All</i>	<i>All</i>
1:35PM - 2:25PM (50 minutes)	Breakout #3 - "Tax-Efficient Strategies in a Time of Uncertainty" - Brandon Buckingham, Prudential Individual Solutions	Breakout #4 - HOLD for Premier Level Sponsor - Emotomy/Northern Trust
	<i>All</i>	<i>All</i>
2:40PM - 3:30PM (50 minutes)	Breakout #5 - "Shortening the Learning Curve" - Carolyn Armitrage, Thrivent Advisor Network	Breakout #3 - HOLD for Premier Level Sponsor, Lincoln Financial
	<i>All</i>	<i>All</i>
4:00PM-5:30PM (90 minutes)	Announcements, Insider's Forum Leadership Award Presentation & Opening Keynote - "Recruiting, Developing and Retaining High-Performing Teams in 2021" - Fran Skinner, AUM Partners	
5:30PM - 7:00PM	<i>Opening Reception & Networking in the Exhibit Hall/Broadway West Prefunction</i>	

Time	Thursday, October 7th - Conference Sessions		
7:30AM - 8:30AM	<i>Breakfast</i>		
8:35AM-10:00AM (85 minutes)	Keynote #2 - "Two Wise Guys: Giachetti+Veres One on One" - Tom Giachetti, Stark & Stark+Bob Veres, Inside Information		
10:00AM -11:00AM	<i>Networking in Exhibit Hall - Broadway Ballroom West Prefunction</i>		
11:00AM -12:15PM (75 minutes)	Breakout #7 - "The Employee Focused Business" - Jeff Sarti, Morton Capital+Stacey McKinnon, Morton Capital	Breakout #8 - "Building Trust in a Virtual World" - Kate Holmes, Innovating Advice	Breakout #9 - "Can You Afford to Ignore Bitcoin - and the clients & prospects who are interested in it" - Tyrone Ross, Onramp Invest
	<i>Owners</i>	<i>All</i>	<i>All</i>
12:15PM - 1:30PM	<i>Lunch</i>		
1:30PM - 2:45PM (75 minutes)	Breakout #10 - "Organic Growth: Invest in Talent to Produce a Lasting Shared Business and Client Experience" - Karen Denise, CAPTRUST+Jessica Ness, CJM Wealth Advisers	Breakout #11 - "How Ops Can Lead with Innovation" - Candice Carlton, FiComm Partners	Breakout #12 -Technology Topic TBA - Joel Bruckenstein
	<i>Owners</i>	<i>Operations</i>	<i>All</i>
3:00PM - 3:50PM (50 minutes)	Breakout #13 - "Creating & Sustaining Your Culture and Vetting Your Next Hire" - Michael Goodman, Wealthstream Advisors+Cheryl Holland, Abacus Planning Group	Breakout #14 - "Incentive Compensation for Operations Positions" - Edgar Collado, Tobias Financial Advisors	Breakout #15 - "Rethinking Advisor Technology" - Brad Felix, Commas+Bill Felix, Truepoint
	<i>Owners</i>	<i>Operations</i>	<i>All</i>
3:50PM - 4:55PM	<i>Networking in Exhibit Hall - Broadway West Prefunction</i>		
4:55PM - 5:00PM	<i>Present Fiduciary of the Year Award</i>		
5:00PM-6:15PM (75 minutes)	Keynote #3 - "Best Planning Ideas" - Ted Sarenski, United Capital+Scott Sprinkle, Sprinkle & Associates+Sue Stevens, Buckingham Strategic Wealth+Lyle Benson, LK. Benson & Co. (moderator)		

6:30PM - 7:30PM	<i>Reception & Networking in the Exhibit Hall/Broadway West Prefunction</i>
Time	Friday, October 8th - Conference Sessions
7:30AM - 8:30AM	<i>Continental Breakfast in Exhibit Hall</i>
8:30AM-9:20AM (50 minutes)	Keynote #4 - Speaker & Topic TBA
9:20AM-10:35AM	<i>Networking in Exhibit Hall - Broadway West Prefunction</i>
10:35AM -12:05PM (90 minutes)	Brunch & Keynote #5 - "The Next Digital Disruption" - Dani Fava, Envestnet
12:05:00PM-12:15PM	Conference Wrap Up