

Insider's Forum 2021 - Schedule of Events

Time	Wednesday, October 6th - Pre-Conference Workshops & Conference Sessions	
8:30AM - 11:30AM	OPEN TO ALL OPS PROFESSIONALS! HIFON Breakfast & 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 - Grab & Go in Broadway West Prefunction</i>	
12:30PM - 1:20PM (50 minutes)	"How To Optimize Video & Podcasts Across the Client Experience" - Candice Carlton, FiComm Partners+Kate Holmes, Innovating Advice	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)	"What You Have vs. What You Need: Structuring Your Wealth Tech for Your Practice Needs" - Adam Boyer, Northern Trust	"Tax-Efficient Strategies in a Time of Uncertainty" - Brandon Buckingham, Prudential Individual Solutions
	<i>Owners & Operations</i>	<i>Owners & Advisors</i>
2:40PM - 3:30PM (50 minutes)	"Shortening the Learning Curve" - Carolyn Armitrage, Thrivent Advisor Network	"Rethinking Portfolio Construction for the Years Ahead" - Amber Williams & Jeff Stanford, Lincoln Financial Group
	<i>Owners & Operations</i>	<i>Owners & Advisors</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 - 6:30PM	<i>Opening Reception & Networking in the Exhibit Hall/Broadway West Prefunction</i>	

6:30PM - 7:30PM	<i>Dinner in Broadway Ballroom EF</i>		
Time	Thursday, October 7th - Conference Sessions		
7:30AM - 8:30AM	<i>Breakfast</i>		
8:30AM-10:00AM (90 minutes)	Student Intros & Keynote - "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)	"The Employee Focused Business" - Jeff Sarti, Morton Capital+Stacey McKinnon, Morton Capital	"Building Trust in a Virtual World" - Kate Holmes, Innovating Advice	"Can You Afford to Ignore Bitcoin - and the clients & prospects who are interested in it" - Justin Castelli, Onramp Invest
	<i>Owners</i>	<i>All</i>	<i>All</i>
12:15PM - 1:30PM	<i>Lunch</i>		
1:30PM - 2:45PM (75 minutes)	"Organic Growth: Invest in Talent to Produce a Lasting Shared Business and Client Experience" - Karen Denise, CAPTRUST+Jessica Ness, CJM Wealth Advisers	"How To Lead With Innovation At Any Level" - Candice Carlton, FiComm Partners	"Tech Tips & the Inside Scoop" - Joel Bruckenstein, T3 & Bob Veres, Inside Information
	<i>Owners</i>	<i>Operations</i>	<i>All</i>
3:00PM - 3:50PM (50 minutes)	"Creating & Sustaining Your Culture and Vetting Your Next Hire" - Michael Goodman, Wealthstream Advisors+Cheryl Holland, Abacus Planning Group	"Incentive Compensation for Operations Positions" - Edgar Collado, Tobias Financial Advisors	"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 - "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>
7:30PM - 8:30PM	<i>Dinner in Broadway Ballroom EF</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 - "Beyond the Basis Points: The Value of (Your) Advice" - Erich Holland & Steve Gardner, SEI
9:20AM-10:35AM	<i>Networking in Exhibit Hall - Broadway West Prefunction</i>
10:35AM -12:05PM (90 minutes)	Brunch & Closing Keynote - "The Next Digital Disruption" - Dani Fava, Envestnet
12:05:00PM-12:15PM	Conference Wrap Up