

Insider's Forum 2022 - Schedule of Events

Time	Wednesday, September 28th - Pre-Conference Workshops & Conference Sessions		
8:30AM - 11:30AM	OPEN TO ALL OPS PROFESSIONALS! HIFON Breakfast & Workshop, Led by Shaun Kapusinski, HIFON Founder 1) "Scalable Growth: Centralized Ops Powered By Technology" - Cory Jackmuff, BLB&B Advisers 2) "The Road Less Traveled: Journey Towards CEO" - Adrienne Gordon, Davis Financial Planning 3) "Effective Ops: Empowering Your Operations Team" - Alison Scherr, Kahler Financial Group <i>Operations (HIFON current & potential members)</i>		
	<i>Grab N Go Lunch Pickup</i>		
12:30PM - 1:20PM (50 minutes)	Breakout #1 - Meet the Students! <i>All</i>	Breakout #2 - "Tax-Deferred Investing" - Michael Finke, The American College (sponsored by Lincoln Financial) <i>All</i>	
	Breakout #3 - "Annuities 201: Evaluating & Comparing Annuities with Purpose" - Tim Rembowski, DPL <i>All</i>	Breakout #4 - "Creating Impact Through Purpose-Driven Guidance" - Dan Wanous, Thrivent Advisor <i>All</i>	
2:40PM - 3:30PM (50 minutes)	Breakout #5 - "One Generation to the Next" - Steven Sweeney, Prudential Financial <i>All</i>	Breakout #6 - TBA <i>All</i>	
	Announcements, Insider's Forum Leadership Award Presentation & Opening Keynote - "The Profession: Where We Are Now & How We Got Here" - Susan Bradley, Sudden Money Institute+Joel Bruckenstein,T3+Ross Levin, Accredited Investors+Bob Veres, Inside Information (moderator)		
5:30PM - 7:00PM	<i>Opening Reception & Networking in the Exhibit Hall/Ballroom B & BC Foyer</i>		
Time	Thursday, September 29th - Conference Sessions		
7:30AM - 8:30AM	<i>Breakfast in Ballroom B</i>		
8:30AM-10:00AM (90 minutes)	Student Intros & Keynote - "The Forces Shaping Our Profession" - Joel Bruckenstein, T3+Brent Weiss, Facet Wealth+Jason Wenk, Altruist+Bob Veres, Inside Information (moderator)		
10:00AM -11:00AM	<i>Networking in the Exhibit Hall/Ballroom B & BC Foyer</i>		
11:00AM -12:15PM (75 minutes)	Breakout #7 - "A Master Class in Managing Transitions" - Susan Bradley, Sudden Money Institute <i>All</i>	Breakout #8 - "Strategic Planning Methodologies: EOS & Agile - Allen Eickelberg, Spire Investment Partners+Brian Martin, Accredited Investors+Adrienne Gordon, Davis Financial Planning (moderator) <i>Operations</i>	Breakout #9 - "Equity Programs to Attract and Retain Top Talent" - Edgar Collado, Tobias Financial Advisors <i>Owners</i>
	<i>Lunch in Ballroom B</i>		
1:30PM - 2:45PM (75 minutes)	Breakout #10 - "How To Discover & Develop a Niche Strategy" - Ginnie Baker, Beard Harris+Tess Downing, Complete View Financial+Lisa Crafford, BNY Mellon Pershing (moderator) <i>All</i>	Breakout #10 - "Financial Planning Best Technical Tips" - Akemi Dalvi, Kondo Wealth Advisors+Ted Sarenski, SageView Advisory Group+Scott Sprinkle, Sprinkle & Associates+Lyle Benson, L.K. Benson & Co. (moderator) <i>Advisors</i>	Breakout #12 - "Adventures In Internal Succession" - Ross Levin, Accredited Investors+Brian Martin, Accredited Investors <i>Owners</i>

3:00PM - 3:50PM (50 minutes)	Breakout #13 - "The Hidden Dimensions of Risk in Client Portfolios" - Akhil Lodha, StratiFi Technologies	Breakout #13 - "Social Security & Medicare: What You & Your Clients Need To Know" - Ted Sarenski, SageView Advisory Group	Breakout #15 - "How To Recruit & Retain The Best Talent " - Caleb Brown, New Plannner Recruiting
	<i>All</i>	<i>Advisors</i>	<i>Owners</i>
3:50PM - 5:00PM	<i>Networking in the Exhibit Hall/Ballroom B & BC Foyer</i>		
5:00PM	<i>Present Fiduciary of the Year Award</i>		
5:00PM-6:15PM (75 minutes)	Keynote - "Age, Fear and Uncertainty: How the Client Mindset is Changing the Client Experience" - Julie Littlechild, Absolute Engagement		
6:30PM - 7:30PM	<i>Reception & Networking in the Exhibit Hall/Ballroom B & BC Foyer</i>		
Time	Friday, September 30th - Conference Sessions		
7:30AM - 8:30AM	<i>Continental Breakfast in Exhibit Hall Ballroom B & BC Foyer</i>		
8:30AM-9:20AM (50 minutes)	Keynote - TBA		
9:20AM-10:35AM	<i>Networking in the Exhibit Hall/Ballroom B & BC Foyer</i>		
10:35AM -12:05PM (90 minutes)	Brunch & Keynote - "The Coming Future of the Profession" - Lisa Crafford, BNY Mellon Pershing+Luke Dean, Utah Valley University+Students		
12:05:00PM-12:15PM	Conference Wrap Up		