

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)	Meet the Students!	"Using Annuities for Tax-Sheltered Growth" - Michael Finke, The American College (sponsored by Lincoln Financial)	
	<i>All</i>	<i>All</i>	
1:35PM - 2:25PM (50 minutes)	"Annuities 201: Evaluating & Comparing Annuities with Purpose" - Tim Rembowski, DPL	"Creating Impact Through Purpose-Driven Guidance" - Dan Wanous, Thrivent Advisor Network	
	<i>All</i>	<i>All</i>	
2:40PM - 3:30PM (50 minutes)	"From One Generation to the Next" - Steven Sweeney, Prudential Financial	"Investing Amid Rising Rates: Is 60/40 Dead? - Christopher Dillon, T. Rowe Price	
	<i>All</i>	<i>All</i>	
4:00PM-5:30PM (90 minutes)	Announcements, Insider's Forum Leadership Award Presentation & Opening Keynote - "The Profession: Where We Are Now & How We Got Here" - Susan Bradley, Financial Transitionist 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)	"A Master Class in Managing Transitions" - Susan Bradley, Financial Transitionist Institute	"Strategic Planning Methodologies EOS and SAFE - Allen Eickelberg, Spire Investment Partners+Brian Martin, Accredited Investors+Adrienne Gordon, Davis Financial Planning (moderator)	"Equity Programs to Attract and Retain Top Talent" - Edgar Collado, Tobias Financial Advisors
	<i>All</i>	<i>Operations</i>	<i>Owners</i>
12:15PM - 1:30PM	<i>Lunch in Ballroom B</i>		
1:30PM - 2:45PM (75 minutes)	"How To Discover & Develop a Niche Strategy" - Ginnie Baker, Beard Harris+Tess Downing, Complete View Financial+Lisa Crafford, BNY Mellon Pershing (moderator)	"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)	"Adventures In Internal Succession" - Ross Levin, Accredited Investors+Brian Martin, Accredited Investors
	<i>All</i>	<i>Advisors</i>	<i>Owners</i>
3:00PM - 3:50PM (50 minutes)	"The Hidden Dimensions of Risk in Client Portfolios" - Akhil Lodha, StratiFi Technologies	"Social Security & Medicare: What You & Your Clients Need To Know" - Ted Sarenski, SageView Advisory Group	"How To Recruit & Retain The Best Talent " - Caleb Brown, New Planner 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-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 - "Beyond Business Planning, Using Metrics to Manage Your Business and Self" - Shauna Mace, SEI		
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		