Insider's Forum 2023 - Schedule of Events

Time	Tuesday, October 3rd - Pre-Conference Workshop & Evening Gathering		
	Herbers & Company Pre-conference Workshop (additional registration fee)		
2:00-5:00PM	**"The Magnificent Middle" workshop led by Herbers & Company partners Angie Herbers, Jarrod Upton and Brandon Moss. Over the course of the past decade the consulting company has worked with innumerable midsize firms (defined as $1 to $10 million in revenue) and we believe they have the greatest opportunity for growth in the current marketplace. During this workshop, we will walk participants through "people, process, and brand" solutions to move from a midsize firm to an elite firm.**		
6:00PM - 7:30PM	*Gather around the fire for casual conversations with light fare & beverages under the stars.*		
	Henry's Hollow		
Time	**Wednesday, October 4th - Workshops & Conference Sessions**		
8:00-11:30AM	*Golf Tournament (pre-registration & fee required)*		
8:30AM - 11:30AM	**OPEN TO ALL!** **HIFON Breakfast & Workshop led by Shaun Kapusinski, HIFON Founder** **1) "Leading Change: How to Successfully Implement Change in a Fast-Paced, RIA World" - Alyssa Phillips, Centura Wealth Advisory** **2) "Lightning in a Bottle: Overcome Challenges and Foster Growth Through a People-First Culture" - Cynthia Greenfield, Culture Keen+Greg Friedman, Wealthspire Advisors** **3) "Revolutionizing Business Operations: Harnessing the Power of AI" - Courtney Sukitch, Waldron**		
11:15-11:45AM	*Grab N Go Lunch Pickup*		
11:30AM - 12:20PM	*Operations Roundtables over lunch*	*"Meet the Students!" Roundtables over lunch*	
	Operations	*All*	
12:30PM - 1:20PM (50 minutes)	**"Balancing Risk & Opportunity in an RIA" - Brian Gaister, Pennington Partners+Shashin Shah, SFMG Wealth Advisors+Chris Gunderson, Amulet Consulting Group (moderator)**	**"Tracking Your Client Service" - Brian Martin, Accredited Investors**	
	Operations+Owners	*All*	
1:35PM - 2:25PM (50 minutes)	**Lightning Round Takeaways (10-minute Talks) - Rosemary Hueser, BOK Financial+Jeff Haines, Thrivent Advisor Network+Chris Sillay, DPL+Cooper Shubert, Hubly**	**Unexpected Marketing: How to Serve Better, Connect Deeply & Grow by Defying Expectations - Kendal Wilde, Snappy Kraken**	**"Lightning Round Takeaways" (10-minute Talks) - Craig Bina, FMG+Mary Ferguson, Concenter Services+Charles Rowlan, Advyzon+James Hughes, Live Oak Bank**
	Advisors	*All*	*Owners*
2:40PM - 3:30PM (50 minutes)	**How to Deliver Valuable Personalized Advice that Your Clients (and Prospects) Don't (Yet) Realize They Need - Bill Coppel, TradePMR**	**Managing Client Financial Structures - Jeff Coyle, Libretto**	
	All	*Owners+Advisors*	
4:00PM-4:05PM	***Announcements & Leadership Award Presentation***		
4:05PM-5:15PM (70 minutes)	**Opening Keynote - "Futuristic Thinking" - Angie Herbers, Herbers & Co.**		
5:15PM - 6:45PM	*Opening Reception & Networking in the Exhibit Hall/Independence Foyer*		
7:00PM - 8:30PM	*Dinner on Independence Lawn*		
Time	**Thursday, October 5th - Conference Sessions**		
7:30AM - 8:30AM	*Sit Down Breakfast on Independence Lawn*		
8:30AM-8:45AM (15 minutes)	***Announcements & Student Introductions***		
8:45AM-10:00AM (75 minutes)	**Keynote - "Succession Stories: Internal, Outside Sales & A Merger of Equals" - Heather Fortner, Signature FD+Stacey McKinnon, Morton Wealth+Tom Orecchio, Modera Wealth+Bob Veres, Inside Information (moderator)**		
10:00AM -11:00AM	*Networking in the Exhibit Hall/Independence Foyer*		
11:00AM -12:15PM (75 minutes)	**"People Management 201" - Karen Denise, CAPTRUST +Jenna Morr, Simon Quick Advisors**	**"Bruckenstein On Tech You Need To Know" - Joel Bruckenstein, T3**	**"Governance, Performance & Growth" - Tim Kochis, Kochis Global**
	Operations	*All*	*Owners*

12:15PM - 1:30PM	*Sit Down Lunch on Independence Lawn*		
1:30PM - 2:45PM (75 minutes)	**"How to Effectively Review Technology" - Chris Emert, F2 Strategy+Steve Ryder, Visory+Shaun Kapusinski, HIFON (moderator)**	**"The Price of Talent & How to Acquire It Along the Career Arc" - Luke Dean, Utah Valley University+Caleb Brown, New Planner Recruiting+Hunter Judson, Jr., The Judson Group+Lisa Crafford, consultant (moderator)**	**"Wealth Transfer Marketing: What the Consulting Industry Isn't Telling You" - Megan Carpenter, FiComm Partners**
	Operations	***All***	***All***
3:00PM - 3:50PM (50 minutes)	**"Mastering Mentorship" - Lisa Crafford, consultant+Amy Flourry, Rehmann Financial**	**"Creating a Hyper-Personalized Client Experience" - Chris Galeski, Morton Wealth**	**"The Continuing Saga of the 4% Rule" - Bill Bengen**
	All	***All***	***Advisors***
3:50PM - 5:00PM	*Networking in the Exhibit Hall/Independence Foyer*		
5:00PM-6:15PM (75 minutes)	**Keynote - "The Wealth (R)evolution: Five Trends That Will Drive the Industry Today, Tomorrow, and in the Future" - Gabe Garcia, SEI**		
6:15PM - 7:15PM	*Reception & Networking in the Exhibit Hall/Independence Foyer*		
7:15PM - 8:45PM	*Dinner in Windwill Plaza*		
Time	**Friday, October 6th - Conference Sessions**		
7:45AM - 8:30AM	*Light Fare in Exhibit Hall/Independence Foyer*		
8:30AM-9:20AM (50 minutes)	**Keynote - "Holistic Leadership: Curiosity, Coaching & AI" - Lindsay Troxell, Our Coaching Initiative**		
9:20AM-10:00AM	*Networking in the Exhibit Hall/Independence Foyer*		
10:00AM -11:30AM (90 minutes)	***Brunch & Keynote - "The Advisory Firm of the Future" - Bob Veres, Inside Information***		
11:30AM-11:45AM	**Conference Wrap Up**		