

Insider's Forum 2024 - Schedule of Events

Time	Monday, September 16th - Workshop & Conference Sessions		
8:30AM - 11:30AM	OPEN TO ALL! HIFON Breakfast & Workshop led by Shaun Kapusinski, HIFON Founder 1) "Revenue is the Responsibility of Operations, Not Sales" - Brett Davidson, FP Advance 2) "Why Would You Ever Want To Be a COO (Or Hire One)?" - Allison Felix, Cassaday and Company 3) "M&A Integration Best Practices" - Alia Wagenhoffer, Cerity Partners		
	Colorado Ballroom A		
11:30AM -11:45AM	<i>Lunch Buffet in Colorado Foyer (pickup and go)</i>		
11:30AM - 12:20PM	<i>Operations Roundtables over lunch</i>	<i>"Student Meet & Greet " over lunch</i>	
	Colorado Ballroom A	Colorado Ballroom B	
	<i>Operations</i>	<i>All</i>	
12:30PM - 1:20PM (50 minutes)	<i>Operations Roundtables over lunch (continued)</i>	"Disability Insurance Planning: When 60% Only Equals 30%, and What to Do About It" - John Ryan, Gallagher USA	
	Colorado Ballroom A	Colorado Ballroom B	
	<i>Owners+Operations</i>	<i>Advisors</i>	
1:35PM - 2:25PM (50 minutes)	"A Leader's Guide to Succession Planning: Why a Client-Centric Approach is Key to Your Success" - Max McQuiston, Capital Group	"It's Time to Stop Outsourcing Asset Allocation to Risk Tolerance Questionnaires" - Martin Tarlie, Nebo Wealth	
	Colorado Ballroom A	Colorado Ballroom B	
	<i>All</i>	<i>All</i>	
2:40PM - 3:30PM (50 minutes)	"The Impact of Custodial Consolidation on the RIA Industry: How Advisors Can Stand Out in the Sea of Sameness" - Scott Victoria, TradePMR	"Beyond the Monte Carlo" - Jeffery Coyle, Libretto	
	Colorado Ballroom A	Colorado Ballroom B	
	<i>All</i>	<i>All</i>	
3:45PM-4:00PM	<i>Conference Welcome, Insider's Forum Leadership Award & Inside Information Iconoclast Award Presentations</i>		
4:00PM-5:15PM (75 minutes)	Opening Keynote "Critical Thinking on the Most Important Trends in the Profession" - Joel Bruckenstein,T3+Angie Herbers, Herbers & Co.+Alan Moore, XYPN+Bob Veres, Inside Information		
	Aspen Ballroom		
5:15PM -6:45PM	<i>Opening Reception & Networking in the Exhibit Hall/Aspen & Colorado Foyers</i>		
Time	Tuesday, September 17th - Conference Sessions		
7:30AM - 8:30AM	<i>Sit Down Breakfast in the Aspen Ballroom</i>		
8:30AM-8:45AM	<i>Announcements & Student Introductions</i>		
8:45AM-10:00AM (75 minutes)	Keynote - "From Efficiency to Engagement: The Evolution of the Client Experience" - Julie Littlechild, Absolute Engagement		
	Aspen Ballroom		
10:00AM -11:00AM	<i>Networking in the Exhibit Hall/Aspen & Colorado Foyers</i>		
11:00AM -12:15PM (75 minutes)	"Talent Management & Development: Tips for Managing, Developing and Retaining Today's Talent" - Laurie Flenner, Aspiriant+Kate Kammes, JMG Financial	"How Do You Fund Major Initiatives or Acquisitions?" - Tom Orecchio, Modera Wealth+Jeff Sarti, Morton Wealth+Lisa Crafford, Constellation Wealth Capital (moderator)	"Marketing By Experts" - Kalli Fedusenko, Financial Advisor Marketing+Andrew Johnson, Testimonial IQ+Jessica Flynn, Intention.ly+Bob Veres, Inside Information (moderator)
	Colorado Ballroom A	Colorado Ballroom B	Aspen Ballroom
	<i>Owners+Operations</i>	<i>Owners</i>	<i>All</i>
12:15PM - 1:30PM	<i>Sit Down Lunch in the Aspen Ballroom</i>		

1:30PM - 2:45PM (75 minutes)	"Best Planning Ideas" - Lyle Benson, L.K. Benson & Co.+Scott Sprinkle, Sprinkle Financial	"Best Practices for Creating Engaging Client Experiences" - Sandi Bragar, Aspiriant+Chris Galeski, Morton Wealth+Julie Littlechild, Absolute Engagement (moderator)	"Cybersecurity Protection" - Maxwell Alles, Alles Technology+Brian Edelman, FCI Cyber+Steve Ryder, Visory+Bob Veres, Inside Information (moderator)
	Colorado Ballroom A <i>All</i>	Colorado Ballroom B <i>Advisors</i>	Aspen Ballroom <i>All</i>
3:00PM - 3:50PM (50 minutes)	"Creating an AI Culture" - Courtney Sukitch, Waldron Private Wealth	"Common Mistakes Advisory Firms Make That Get You Into Trouble" - Tom Giachetti, Stark & Stark	"Comparing Sources of Capital" - James Hughes, Live Oak Bank+Yvonne Kanner, Tria+Jonathan Rogers, Forum Financial +Bob Veres, Inside Information (moderator)
	Colorado Ballroom A <i>All</i>	Colorado Ballroom B <i>All</i>	Aspen Ballroom <i>Owners</i>
3:50PM - 5:00PM	<i>Networking in the Exhibit Hall/Aspen & Colorado Foyers</i>		
5:00PM-5:50PM (50 minutes)	Keynote - "Next Gen, AI and All That's In Between" - Jeff Benfield, SEI		
	Aspen Ballroom		
5:50PM - 7:15PM	<i>Reception & Networking in the Exhibit Hall/Aspen & Colorado Foyers</i>		
Time	Wednesday, September 18th - Conference Sessions		
7:45AM - 8:30AM	<i>Light Fare in Exhibit Hall/Aspen & Colorado Foyers</i>		
8:30AM-9:20AM (50 minutes)	Keynote - "Key Considerations to Create a Marketing Engine in 2025" - Brittany Abbate, Choreo Advisors+Daniella Chuckran, Aspiriant+Bob Veres, Inside Information (moderator)		
	Aspen Ballroom		
9:20AM-10:00AM	<i>Networking in the Exhibit Hall/Aspen & Colorado Foyers</i>		
10:00AM -11:30AM (90 minutes)	Brunch & Keynote - "The Evolution of Advisor Fees and Revenue Models" - Bob Veres, Inside Information		
	Aspen Ballroom		
11:30AM-11:45AM	Conference Wrap Up		