

## Insider's Forum 2020 Virtual Event Webinar Schedule

DATE	WEBINAR START TIME	TITLE or TOPIC	SPEAKER(S)
Video recording available on EngageZ platform	1PM PT/4PM ET	Seeking Innovation Everywhere	Dani Fava, Jason Wenk & Bob Veres
Video recording available on EngageZ platform	1PM PT/4PM ET	Talking to Clients About Annuities & Secure Income	David Lau
	1PM PT/4PM ET	Total Client Experience: A Journey Through Growth, Part 1	Angie Herbers
Video recording available on EngageZ platform	1PM PT/4PM ET	Back to the Future	Sophia Bera, Greg Friedman, Eric Hehman & Bob Veres (moderator)
Video recording available on EngageZ platform	1PM PT/4PM ET	Protecting Your Business From Cyber & Other Threats	Travis Pearson & Steve Ryder
Thursday, September 10, 2020	1PM PT/4PM ET	Total Client Experience: A Journey Through Growth, Part 2	Angie Herbers
Tuesday, September 15, 2020	1PM PT/4PM ET	Annuities as an Asset Class	Adam Lalla
Thursday, September 17, 2020	1PM PT/4PM ET	Pros & Cons of M&A	Peter Mallouk, Tom Orecchio & Angie Herbers (moderator)
Thursday, September 24, 2020	1PM PT/4PM ET	Beyond Succession	Eric Hehman
Monday, September 28, 2020	1PM PT/4PM ET	Good to Great	Stacey McKinnon
Thursday, October 1, 2020	1PM PT/4PM ET	Custodial Choice: Beyond the Usual Suspects	Robb Baldwin, Erich Holland, Dan Skiles & Bob Veres (moderator)
Monday, October 5, 2020	1PM PT/4PM ET	Live with Matt!	Matt Sonnen
Thursday, October 8, 2020	1PM PT/4PM ET	Marketing for the Modern Advisor	Megan Carpenter
Thursday, October 15, 2020	1PM PT/4PM ET	Preparing For & Navigating Through SEC Examinations	Tom Giachetti
Tuesday, October 20, 2020	1PM PT/4PM ET	Matter More to Your Clients	Mike Flinn, Rosemary Hueser
Thursday, October 22, 2020	1PM PT/4PM ET	Best Planning Ideas During the Pandemic	Ted Sarenski, Scott Sprinkles, Sue Stevens & Lyle Benson (moderator)
Tuesday, October 27, 2020	1PM PT/4PM ET	The Evolving Advisor/Custodial Partnership	Ben Harrison, Bob Veres
Thursday, October 29, 2020	1PM PT/4PM ET	How to Find, Hire & Retain the Best & the Brightest	Hunter Judson, Rebekah Kohmescher & Shaun Kapusinski (moderator)
Monday, November 2, 2020	1PM PT/4PM ET	Industry Research & Application	Lisa Crafford & Shaun Kapusinski
Thursday, November 5, 2020	1PM PT/4PM ET	Joel Talks (More) Tech with Bob	Joel Bruckenstein, Bob Veres
Thursday, November 12, 2020	1PM PT/4PM ET	Cybersecurity	John Anderson

**NOTES: Most panels are 75 minutes and solo presentations are 60 minutes, including Q&A.**