

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) TBA <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!	Breakout #2 - TBA	
	<i>All</i>	<i>All</i>	
1:35PM - 2:25PM (50 minutes)	Breakout #3 - TBA	Breakout #4 - TBA	
	<i>All</i>	<i>All</i>	
2:40PM - 3:30PM (50 minutes)	Breakout #5 - TBA	Breakout #6 - TBA	
	<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, 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	Breakout #8 - "Strategic Planning Methodologies: EOS, ROWE & Agile - Allen Eickelberg, Spire Investment Partners+Brian Martin, Accredited Investors+Shaun Kapusinski, HIFON	Breakout #9 - "Equity Transfers & Succession" - 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)	Breakout #10 - "Financial Planning Best Technical Tips" - Scott Sprinkle, Sprinkle & Associates+Sue Stevens Buckingham Strategic Wealth+Lyle Benson, L.K. Benson & Co. (moderator)	Breakout #11 - "Developing a Niche Strategy" - Ginnie Baker, Beard Harris+Tess Downing, Complete View Financial++Lisa Crafford, BNY Mellon Pershing (moderator)	Breakout #12 - "Internal Succession" - Becky Krieger+Ross Levin+Brian Martin, Accredited Investors
	<i>Advisors</i>	<i>All</i>	<i>Owners</i>
3:00PM - 3:50PM (50 minutes)	Breakout #13 - TBA	Breakout #13 - "Medicare & Social Security: What You & Your Clients Need To Know" - Ted Sarenski, SageView Advisory Group	Breakout #15 - "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	<i>Present Fiduciary of the Year Award</i>
5:00PM-6:15PM (75 minutes)	Keynote - "Incorporating the Voice of the Client" - 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 Impending Future of the Profession" - Lisa Crafford, BNY Mellon Pershing+Luke Dean, Utah Valley University+Students TBA
12:05:00PM-12:15PM	Conference Wrap Up