

## Insider's Forum 2016 - Schedule of Events

Monday September 19, 2016 -Conference Sessions				
7:30AM-12:00PM (approximately 4-4.5 hours)	<i>Golf Tournament - Golfer and advisor Bob Zimberg will be running the tournament and setting up the foursomes. Playing time is 4-4.5 hours; cost is \$95 for green fees, a shared cart, a prize fund, a \$17 restaurant credit for drinks and/or food at the Coronado Golf Course, and a lot of fun! Register through the conference website.</i>			
	<b>Coronado Municipal Golf Course</b>			
	<i>CEO &amp; Strategic Leaders</i>	<i>Investment+Brilliant Thinking Technical Track</i>	<i>Operations Team Leaders</i>	<i>Brilliant Thinking+Communicating Track</i>
12:30PM-1:20PM (50 minutes)	<b>Breakout #1 - "Pay for Performance: Assessing &amp; Rewarding the Contributions of Employees Who Are Also Owners" - Tim Kochis, Kochis Global+Rebecca Pomeroy, Moss Adams Wealth Advisors</b>	<b>Breakout #2 - TBA</b>	<b>Breakout #3 - "Operations Team Leadership &amp; Career Development" - Kelli Cruz, Cruz Consulting Group+Amy Flourry, Rehmann+Jeff Ramsey, Lee Financial (moderator)</b>	
1:30PM-2:20PM (50 minutes)	<b>Breakout #4 - "Absolute Engagement: Re-focus, Re-Energize and Grow" - Julie Littlechild, Absolute Engagement</b>	<b>Breakout #5 - "Hit The Road, Jack" Advisor Mobility TED Talks -"Do You Know Your Risks?" - Travis Pearson, Markel Cambridge+"Web Conferencing" - Scott Leonard, Navigoe+"Mobile Cybersecurity" - Sid Yenamandra+"Telephony Mobility" - TBA</b>	<b>Breakout #6 - "How Do You Measure The Effectiveness of Your Operations Team?" - Ken Evans, Moss Adams Wealth Advisors+Heather Fortner, SignatureFD+Karen Novak, Pershing Advisor Solutions (moderator)</b>	
2:30PM-3:30PM (60 minutes)	<b>"Meet &amp; Greet" - Socialize &amp; network with advisory firm attendees, sponsoring firm representatives and speakers over beverages.</b>			
	<b>Crown+Coronet</b>			
3:45PM-5:00PM (75 minutes)	<b>Conference Welcome &amp; Opening Keynote #1 - "From Business to Enterprise" - Tim Kochis, Kochis Global+Harry Jones, Edge Capital Partners+Gabe Garcia, Pershing Advisor Solutions (moderator)</b>			
	<b>Ballroom</b>			
5:00PM - 6:30PM (90 minutes)	<b>Opening Cocktail Reception &amp; Networking in Exhibit Hall/Crown+Coronet</b>			
Tuesday, September 20, 2016 - Conference Sessions				
Time				
6:30AM - 7:30AM (60 minutes)	<b>Yoga Class on the Beach (Optional). Cost is \$25 p/person. Call Krista Clayton on 619-522-8833 or e-mail her at kclayton@hoteldel.com to reserve your spot!</b>			

7:45AM - 8:45AM (60 minutes)	<i>Breakfast Buffet in Garden Patio</i>			
8:45AM - 8:50AM	<i>Conference Announcements</i>			
8:50AM - 10:05AM (75 minutes)	Keynote #2 - "Tools & Ideas to Create a Satisfying, Addictive Client Experience" - Lex Sokolin, Vanare+Joel Bruckenstein, T3 (moderator)+other panelists TBA			
	Ballroom			
10:05AM - 11:05AM (60 minutes)	<i>Networking Break in Exhibit Hall/Crown+Coronet</i>			
	<i>CEO &amp; Strategic Leaders</i>	<i>Investment+Brilliant Thinking Technical Track</i>	<i>Operations Team Leaders</i>	<i>Brilliant Thinking+Communicating</i>
11:05AM - 12:20PM (75 minutes)	Breakout #7 - "Welcome to the Holacracy" - Rick Kahler, Kahler Financial Group+Carolyn McClanahan, Life Planning Partners+Bob Veres, Inside Information (moderator)	Breakout #8 - "Enhancing Your Retirement Planning Toolkit" - Wade Pfau (Social Security+reverse mortgages+LTC)	Breakout #9 - "X-Cell: The New Frontier of Advisory Client Service" - Angie Herbers, Kaleido	Breakout #10 -TBA
12:20PM - 1:35PM (75 minutes)	<i>Lunch with Roundtable Discussions in Garden Patio</i>			
1:35PM - 2:25PM (50 minutes) OR 1:35PM - 3:15PM (100 minutes)	Breakout #11 - "Want to Grow - Yourself, Your Team & Your Firm? Learn to Delegate" Fran Skinner, AUM Partners	Breakout #12 - "Building Better Investors: Tools for Collaborative Portfolio Design" - Chris Sidoni	Breakout #13 - "Presenting Yourself Powerfully" - Lynn Torgove+Patricia Weinmann, Gabriel Communications	Breakout #14 - "Creating a Marketing Culture" - Kristen Luke, Kaleido
2:35PM - 3:25PM (50 minutes)	Breakout #15 - TBA	Breakout #16 - TBA		
3:15PM - 4:15PM (60 minutes)	<i>Networking Break in Exhibit Hall/Crown+Coronet</i>			
4:15PM-4:20PM (5 minutes)	<i>Announce Insider's Forum Leadership Award</i>			
4:20PM - 5:20PM (60 minutes)	Keynote #3 - "Be Your Own Stage Director" - Lynn Torgove+Patricia Weinmann, Gabriel Communications			
	Ballroom			

5:30PM - 7:00PM (90 minutes)	<i>Beach Volleyball Tournament w/beer &amp; wine on the beach</i>			
<b>Wednesday, September 21, 2016 - Conference Sessions</b>				
Time				
7:15AM - 8:15AM (60 minutes)	<i>Breakfast Buffet with Roundtable Discussions in Garden Patio</i>			
8:20AM - 9:20AM (60 minutes)	Keynote #4 - TBA			
	Ballroom			
9:20AM - 10:35AM (75 minutes)	<i>Networking Break in Exhibit Hall/Crown+Coronet</i>			
	<i>CEO &amp; Strategic Leaders</i>	<i>Investment+Brilliant Thinking Technical Track</i>	<i>Operations Team Leaders</i>	<i>Brilliant Thinking+Communicating</i>
10:35AM - 11:50PM (75 minutes)	Breakout #17 - "Beyond the Basics: Diamond Teams for Enterprise Firms" - Angie Herbers, Kaleido	Breakout #18 - "Awesome Planning for Special Needs: Issues, Opportunities & Pitfalls" - Michael Walther, Oak Wealth Advisors	Breakout #19 - "Operations: The Foundation for Organizational Change" - Vic Esclamado, DeVoe & Co.+Young Kim, Aspiriant+Nathan Mersereau, Planning Alternatives	Breakout #20 - Brilliant Communicating TED Talks - "Deliberately Developmental Organizations" - Rick Kahler+"How To Write About Your Firm & How To Work Your Media Mojo" - Liz Weston+"How Video is Changing the Game for Forward Thinking Financial Advisors" - Jill Addison+"Collaborative Selling & Communications Skills" - Marie Swift+ Lisa Crafford (emcee)
11:50AM - 1:20PM (90 minutes)	Lunch & Town Hall Meeting Keynote #5 - Bob Veres			
	Ballroom			
1:20PM - 1:45PM (25 minutes)	Conference Wrap-Up - Bob Veres & Jean Sinclair			
	Ballroom			