

Insider's Forum 2019 - Schedule of Events

Time	Wednesday, September 11, 2019 - Pre-Conference Sessions & Workshops			
8:30AM - 12:00PM	Workshop #1 - "Diamond Teams" - Angie Herbers, Angie Herbers, Inc. (additional cost for registration)	8:30AM - 11:30AM	HIFON Meeting & Workshop led by Shaun Kapusinski, Sequoia Financial Group 8:30-9:20AM "Managing Your Career Path" - Xandra Pendergrass, COO Signature Family Wealth Advisors 9:35-10:25AM "Day-to-Day Compliance" - Dave Spratt, COO & CCO, Merriman+Eric Sontag, President & COO, Sontag Advisory 10:40-11:30AM "Building Out Your Ops Team" - Martine Lellis, COO, Sullivan Bruyette Speros & Blayne	
	<i>Owners</i>		<i>Operations (HIFON current & potential members)</i>	
12:30PM - 3:30PM	3 CFP CEU Presentations: 1) John Ryan, RISC 2) ExchangeRight 3) PlanPlus Global	3 CFP CEU Presentations: 1) Zeo Capital 2) TBA 3) TBA	"Managing Client Relationships" Training Workshop - Philip Palaveev & Jahnki Patel, The Ensemble Practice (maximum of 60 registrants)	
	<i>Advisors</i>	<i>Advisors</i>	<i>Newer Professionals</i>	
4:00PM-5:30PM (90 minutes)	Announcements & Opening Keynote - "The Insider Community Town Hall Meeting" - Bob Veres, Inside Information+surprise special guests!			
5:30PM - 7:00PM	<i>Opening Cocktail Reception & Networking in the Exhibit Hall/Broadway West Prefunction</i>			
Time	Thursday, September 12, 2019 - Conference Sessions			
7:30AM - 8:30AM	<i>Breakfast Buffet in Cumberland 1-6</i>			
8:35AM-10:00AM (85 minutes)	Student Intros & Announcements & Keynote #2 - "Identifying & Developing Leaders" - Philip Palaveev & Janki Patel, The Ensemble Practice			
10:00AM -11:00AM	<i>Networking in Exhibit Hall - Broadway Ballroom West Prefunction</i>			
11:00AM -12:15PM (75 minutes) OR 11:00AM -12:00PM (60 minutes)	Breakout #1 - "The Future-Ready Service Model " - Matthew Jackson (75 minutes)	Breakout #2 - "Technical Topics Updates & Best Ideas " (75 minutes) - Ted Sarenski, Blue Ocean Strategic Capital+David Oransky, Laminar Wealth+Lisa Featherngill, Abbott Downing+Lyle Benson, L.K. Benson & Co. (moderator)	Breakout #3 - "Project Management: Tracking & Organizing Projects" (60 minutes) - Erica Farber, Balentine LLC+Rebeka Kohmescher, Altair Advisors+Lisa Crafford, Pershing Advisor Solutions (facilitator)	Breakout #4 - (60 minutes) in deveopment
	<i>Owners</i>	<i>Advisors</i>	<i>Operations</i>	<i>All</i>
12:00PM - 1:30PM	<i>Lunch with Roundtable Discussions - in Cumberland 1-6</i>			

1:30PM - 2:45PM (75 minutes)	Breakout #5 - "The Tech Revolution in Portfolio Marketplaces" - panel in development+Bob Veres (moderator)	Breakout #6 - in development - Carolyn McClanahan, Life Planning Partners	Breakout #7 - "Defining Your Client Experience" - Kaylyn Norvell, Socius+Jandy Rowe, Wipfli Financial Advisors+Gabe Muller, Muller Consulting (moderator)	Breakout #8 - "Joel Talks Tech" - Joel Bruckenstein, T3
	<i>Owners+Advisors</i>	<i>Advisors</i>	<i>Operations</i>	<i>All</i>
3:00PM - 3:50PM (50 minutes)	Breakout #9 - "Executive Compensation: Optimizing Values & Managing Concentration Risk" - Tim Kochis, Kochis Global	Breakout #10 - TBA	Breakout #11 - in development, Lincoln Financial	Breakout #12 - in development, Raef Lee, SEI
	<i>Advisors</i>			
3:50PM - 5:00PM	<i>Networking in Exhibit Hall - Broadway West Prefunction</i>			
5:00PM-6:15PM (75 minutes)	Keynote #3 - TBA			
6:30PM - 7:30PM	<i>Opening Cocktail Reception & Networking in the Exhibit Hall/Broadway West Prefunction</i>			
Time	Friday, September 13, 2019 - Conference Sessions			
7:30AM - 8:30AM	<i>Breakfast Buffet with Roundtable Discussions</i>			
8:30AM-9:20AM (50 minutes)	Keynote #4 - TBA			
9:20AM-10:35AM	<i>Networking in Exhibit Hall - Broadway West Prefunction</i>			
10:35AM - 11:25AM (50 minutes)	Breakout #13 - "Using Client Segmentation & Profitability Analysis To Build a Better Business" - Anders Jones, Facet Wealth	Breakout #14 - "College & Newer Planner Recruitment, Hiring & Compensation" - Caleb Brown, New Planner Recruiting+Luke Dean, Utah Valley University	Breakout #15 - "Scale: What It Looks Like & How To Achieve It" - Christopher Lion, Barnett Financial+Michael Reed, Dakota	Breakout #16 - "Wealth Management Strategy Development" - Roy Ballentine, Ballentine Partners
	<i>Owners+Operations</i>	<i>Owners+Operations</i>	<i>Operations</i>	<i>Advisors</i>
11:30AM -1:00PM (90 minutes)	<i>Lunch & Keynote #5 - "Leading Internally to Accelerate Through Your Firm's Growth Cycle" - Angie Herbers, Angie Herbers, Inc.</i>			
1:00PM-1:15PM	Conference Wrap Up			