

WOMEN SUMMIT

Nov 30-Dec 2, 2022 | Palm Beach, FL Dec 6-8, 2022 | Virtual

WEDNESDAY, NOVEMBER 30, 2022

11:00 AM – 7:00 PM

REGISTRATION

South Loggia

11:45 AM – 1:45 PM

ADVISORS-ONLY NETWORKING LUNCH

Mediterranean Courtyard

Sponsored by Macquarie Asset Management

2:00 PM – 4:00 PM

PRE-CONFERENCE SESSION

Ponce 3

How to Build Your Business by Hating Bitcoin

Ric Edelman, Founder, Digital Assets Council of Financial Professionals

CFP I-W

Ponce 3

Is this Crypto Winter or Crypto Armageddon? New Insights on Crypto and Blockchain for Financial Advisors

Matt Hougan, CIO, Bitwise Asset Management

Interviewer: Kristen Bellstrom, Managing Editor, Barron's

CFP I-W

5:00 PM – 6:30 PM

COCKTAIL RECEPTION

Mediterranean Ballroom

6:30 PM – 8:30 PM

WELCOME DINNER & SPEAKER

Venetian Ballroom

Laura Linney, Award-Winning Theatre, Film & Television Actress

Interviewed By: Tricia Kasner, Barron's Group

8:30 PM – 9:30 PM

TOP 100 COCKTAIL RECEPTION

Gold Room

For Ranked Advisors Past & Present

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THURSDAY, DECEMBER 1, 2022

7:45 AM – 6:00 PM REGISTRATION

South Loggia

7:45 AM – 8:45 AM BREAKFAST

Mediterranean Ballroom

8:45 AM – 9:35 GENERAL SESSION

Venetian Ballroom

The Morning News with Barron's

Jennifer Flitton, Senior Vice President, US Government Affairs, Invesco

Leslie Geller, Wealth Strategist, Capital Group

Elizabeth Varley, Vice President, Federal Governmental Affairs Office,
Columbia Threadneedle Investments

Moderator: **Alicia Levine**, Head of Equities, Trading, and Capital Markets
Advisory, BNY Mellon Wealth Management

CFP I-W

9:35 AM – 9:50 AM REFRESHMENT BREAK

Mediterranean Ballroom

9:50 AM – 10:40 AM BREAKOUTS

The Circle

Follow the Money: How Elite Advisors Are Preparing for a Massive Transfer of Wealth

Victoria Bailey, Morgan Stanley Private Wealth Management

Nancy Daoud, Ameriprise Financial

Valerie Newell, Mariner Wealth Advisors

Moderator: **John Rahal**, Principle, Firm Transformation, Edward Jones

Ponce 3

Real Estate: Where in the World Can Investors Find Opportunity?

Jeffrey Kolitch, Vice President, Portfolio Manager, Baron Real Estate Fund
and Baron Real Estate Income Fund

Carly Tripp, Global Chief Investment Officer and Head, Nuveen Real Estate
Investments

Moderator: **Barbara Archer**, Partner, Hightower Wealth Advisors

CFP I-W

Ponce 4

An Exclusive Look into Both Sides of the Equation: Managing Client Relationships as Retirement Nears

Mary Deatherage, Morgan Stanley Private Wealth Management

Holidae Hayes, UBS Wealth Management

Elizabeth Weikes, J.P. Morgan Wealth Management

Moderator: **Caroline Gundeck**, Head of Client Development, Wealth
Management, Morgan Stanley Wealth Management

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Ponce 5

Model Portfolios: Creating Bespoke Investment Portfolios for Women Investors

CFP I-W

Carrie Schroen, U.S. Wealth Advisory Division Director, BlackRock
Stacey Tovrov, Head of Investment Strategy and the Retirement Solutions for Multi-Asset Strategies & Solutions, BlackRock
Moderator: **Stephanie Epstein**, Managing Director, Global Head of Multi-Manager & Models Infrastructure Platform, BlackRock

10:40 AM – 10:55 AM

REFRESHMENT BREAK

Mediterranean Ballroom

10:55 AM – 11:45 AM

BREAKOUTS

The Circle

Balancing Act: How to Make Your Team 'More Cohesive' to Maximize Productivity

Kathleen Grasmeder, Managing Director, Morgan Stanley Wealth Management
Wendy Holmes, UBS Private Wealth Management
Michelle Mayer, Merrill Lynch Private Wealth Management
Moderator: **Beverly Flaxington**, Bestselling & Gold-Award Winning Author, The Collaborative

Ponce 3

Beyond 60/40: The Macro Backdrop for Alternative Investments Looks Enticing

CFP I-W

Brian Daley, Vice President, Product Specialist, CAIS
Jeannette Pieper, Managing Director, Blackstone Private Wealth Solutions
Katherine Taylor, Managing Director, First Eagle Investment Management
Moderator: **Alyssa Moeder**, Managing Director and Private Wealth Advisor, Merrill Lynch Wealth Management

Ponce 4

How the Power of Philanthropy has Dramatically Changed Cancer Outcomes

Myra Biblowit, President & Chief Executive Officer, Breast Cancer Research Foundation
Moderator: **Tricia Kasner**, Barron's Group

Ponce 5

Behavioral Coaching When Your Clients Need It Most

Colleen Jaconetti, Senior Manager, Investment Advisory Research Center at Vanguard
Moderator: **Maria Quinn**, Senior Advice Strategist, Vanguard's Investment Advisory Research Center

11:45 AM – 12:00 PM

REFRESHMENT BREAK

Mediterranean Ballroom

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12:00 PM – 1:00 PM

Venetian Ballroom

LUNCH

1:00 PM – 1:50 PM

Venetian Ballroom

GENERAL SESSION

Women on the Rise: Learning More and Earning More

Carol Geremia, President & Head of Global Distribution, MFS Investment Management

Jenny Johnson, CEO, Franklin Templeton

Moderator: **Kristina Van Liew**, Managing Director, Institutional Consulting Director, Graystone Consulting, a business of Morgan Stanley

CFP I-W

1:50 PM – 2:05 PM

Mediterranean Ballroom

REFRESHMENT BREAK

2:05 PM – 2:55 PM

The Circle

BREAKOUTS

CULTURE- Create a Referable Culture for Employees & Clients

Karen Altfest, Altfest Personal Wealth Management

Rebekah Kohmescher, Altair Advisers LLC

Carolyn Nolan, Private Wealth Advisor & CEO of The Nolan Group, Ameriprise Financial

Moderator: **Stephanie Luedke**, Head of Private Wealth Management, a division of Neuberger Berman

Ponce 3

Volatility Creates Uncertainty - And Opportunity: Spying Value in Fixed Income, and Private Markets

Carlin Calcaterra, Principal, Ares Wealth Management Solutions

Daniela Mardarovici, Managing Director, Co-Head of US Multi Sector Fixed Income, Delaware Funds at Macquarie

Lindsay Rosner, Principal and Portfolio Manager, PGIM Fixed Income

Moderator: **Susan Heuer**, Managing Director, Merrill Lynch Wealth Management

CFP I-W

Ponce 4

The Anatomy of a Succession Plan

Lauren Lisbon, Source Financial Advisors

Casey McKeon, Dynasty Financial Partners

Michelle Smith, Source Financial Advisors

Moderator: **April Ferrell**, Managing Director Global Head of Asset Manager Relationships, Barron's Group

Ponce 5

Best Practices for Managing Legacy Wealth

Jan Blakeley Holman, Director of Advisor Education, Thornburg Investment Management

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2:55 PM – 3:10 PM

Mediterranean Ballroom

REFRESHMENT BREAK

3:10 PM – 4:00 PM

The Circle

BREAKOUTS

Keeping Perspective: Putting Your Family First, Business Second

Galit Ben-Joseph, J.P. Morgan

Holly Newman Kroft, Neuberger Berman

Laura Wellon, UBS Wealth Management

Moderator: **Sally Cates**, Managing Director, PR and Communications, Dynasty Financial Partners

Ponce 3

Munis as a Source of Shelter During Times of Market Stress

Rachel Betton, Executive Vice President, Municipal Bond Portfolio Management, PIMCO

Ann Ferentino, Portfolio Manager, Senior Investment Analyst, Vice President, Federated Hermes

Moderator: **Nelrae Pasha Ali**, Senior Financial Advisor, Managing Director - Investments, Wells Fargo Advisors LLC

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Ponce 4

How Influential Women in Finance are Mentoring our Future Female Leaders

Saira Malik, Chief Investment Officer, Nuveen

Sue Thompson, Head of SPDR Americas Distribution, State Street Global Advisors

Moderator: **Reshma Kapadia**, Associate Editor, Barron's

Ponce 5

Refining Your Team Dynamic: A Model to Build Productivity, Communication and Innovation in 2023

Julie Genjac, Vice President and Managing Director, Applied Insights for Hartford Funds

4:00 PM – 4:15 PM

Mediterranean Ballroom

REFRESHMENT BREAK

4:15 PM – 5:00 PM

Venetian Ballroom

GENERAL SESSION & KEYNOTE SPEAKER

Maye Musk, Model, Nutritionist, Speaker & Entrepreneur

Interviewer: **April Ferrell**, Managing Director Global Head of Asset Manager Relationships, Barron's Group

5:00 PM – 6:00 PM

Venetian Ballroom

COCKTAIL RECEPTION

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FRIDAY, DECEMBER 2, 2022

8:00 AM – 11:00 AM

REGISTRATION

South Loggia

8:00 AM – 9:00 AM

BREAKFAST

Mediterranean Ballroom

9:00 AM – 9:50 AM

GENERAL SESSION

Venetian Ballroom

Words of Wisdom for Achieving Success in 2023

Heather Hunt-Ruddy, Head of National Sales, Wells Fargo Advisors LLC

Penny Pennington, CEO, Edward Jones

Jennifer Povlitz, Divisional Director, West, UBS Wealth Management

Moderator: **Michelle Smith**, CEO, Source Financial Advisors

9:50 AM – 10:05 AM

REFRESHMENT BREAK

Mediterranean Ballroom

10:05 AM – 10:55 AM

BREAKOUTS

Ponce 3

Body Language Tune-up: How to Make Sure Your Voice & Posture are In-Sync with your Words

Jane Hanson, CEO & Founder, HHH Productions

Ponce 4

ESG: Separating Fact from Fiction

Annie Joyce, Managing Director, Head of ESG, Amundi US

Clara Sierra, Senior Director, Business Development, Global Sales, Moody's Analytics

CFP I-W

Ponce 5

Smart Strategies for Strategic Planning and Teaming

Brie Williams, Head of Practice Management, State Street Global Advisors

10:55 AM – 11:10 AM

REFRESHMENT BREAK

Mediterranean Ballroom

11:10 AM – 12:00 PM

GENERAL SESSION

Venetian Ballroom

The Latest Geopolitical Intel

Beth Sanner, Presidential Intelligence Briefer and 35-Year National Security Leader

Interviewer: **Jack Otter**, Global Head, Barron's Wealth & Asset Management Group