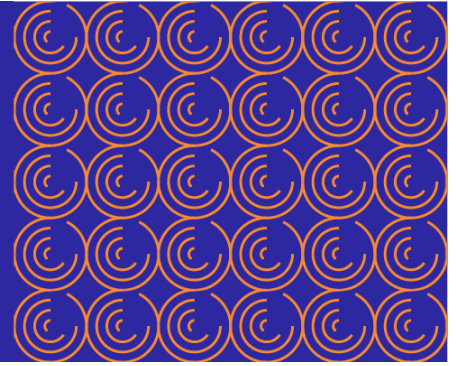


100 SUMMIT

January 18-20, 2023 | Salt Lake City, UT January 24-26, 2023 | Virtual



WEDNESDAY, JANUARY 18, 2023

1:00 PM – 7:00 PM

REGISTRATION

Grand Ballroom Prefunction

2:00 PM – 4:00 PM

PRE-CONFERENCE SESSION

Venezia

Crypto & Blockchain for Elite Advisors

Matt Hougan, CIO, Bitwise

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

Interviewer: **Kristen Bellstrom**, Managing Editor, Enterprise & Investigations, Barron's

CFP IWI

5:00 PM – 6:00 PM

COCKTAIL RECEPTION

Grand Ballroom Reception

6:00 PM – 8:00 PM

Grand Ballroom

WELCOME DINNER & SPEAKER – Geopolitical Insights: How to Make Sense of it All

Eric Traupe, Senior CIA executive with 30 years of combined experience in the US Intelligence Community and United States Marine Corps

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

8:00 PM – 9:00 PM

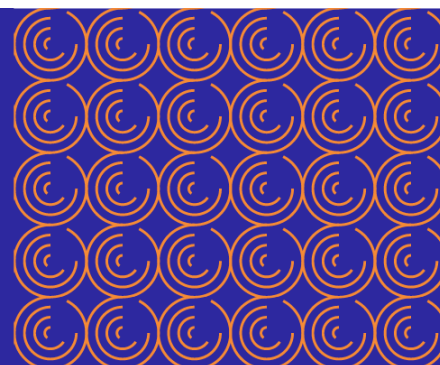
Oak Room

TOP ADVISORS COCKTAIL RECEPTION (for Ranked Advisors Past & Present)

Attendees of the Barron's 100 Summit can apply for 11 CE CFP eligible credits & 13 CE hours (toward CIMA / CIMC / CPWA designations). Please scan your badge at the door of each session.

100 SUMMIT

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THURSDAY, JANUARY 19, 2023

7:30 AM – 6:00 PM REGISTRATION

Grand Ballroom Prefunction

7:30 AM – 8:30 AM BREAKFAST

Grand Ballroom Prefunction

8:30 AM – 9:20 AM GENERAL SESSION

Grand Ballroom

The Morning News with Barron's

Daniel Hyman, Managing Director, Head of Agency Mortgage Portfolio Management, PIMCO

Brian Levitt, Global Market Strategist, Invesco

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

CFP IWI

9:20 AM – 9:35 AM REFRESHMENT BREAK

Grand Ballroom Prefunction

9:35 AM – 10:25 AM BREAKOUTS

Grand Ballroom A

The Growth Imperative: Finding the Best Strategy for Your Firm

John Furey, Advisor Growth Strategies, LLC

Paul Saganey, Integrated Partners

Chris Toomey, Morgan Stanley Private Wealth Management

Moderator: **Brian Hamburger**, Founder, President & CEO, MarketCounsel Consulting

Grand Ballroom D

Pardon the Interruption - A Real-Time Take on the Fed, Market and Economy

Steve Chiavarone, Vice President, Head of Multi Asset Solutions, Federated Hermes

Phil Orlando, Senior Vice President, Chief Equity Market Strategist, Federated Hermes

Moderator: **Michael Wolff**, Senior Vice President, Senior Regional Consultant, Federated Hermes

CFP IWI

Venezia

Find Calm and Clarity Amid Chaotic Commodities

Shawn Reynolds, Portfolio Manager, Global Resources, VanEck

Interviewer: **Sam Onan**, Regional Vice President - North Central, VanEck

CFP IWI

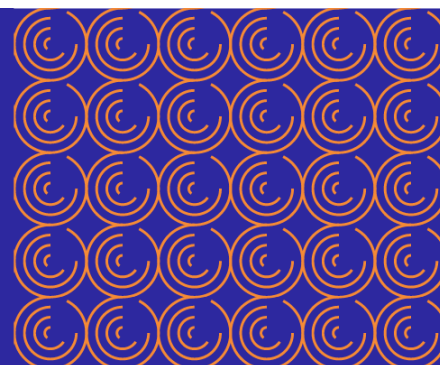
10:25 AM – 10:40 AM REFRESHMENT BREAK

Grand Ballroom Prefunction

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100 SUMMIT

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10:40 AM – 11:30 AM

Grand Ballroom A

BREAKOUTS

How to Build, Scale, and Compensate a Winning Team That Outperforms Year After Year

Charles Balducci, Merrill Lynch Wealth Management

Kayvon Sarmadi, UBS Financial Services, Inc.

Richard Zinman, Morgan Stanley Private Wealth Management

Moderator: **David Chubak**, Head of Wealth Management, Edward Jones

Grand Ballroom D

How to Shift from Advisor to Advocate

Dennis Moseley-Williams, Founder & CEO, Dennis Moseley-Williams Strategic Counsel

Venezia

Asymmetric Risk: A Deep Dive on Risk for Active Equity Managers to Enhance Outcomes

Steve Deschenes, Director of Client Research, Capital Group

CFP IWI

11:30 AM – 11:40 AM

Grand Ballroom Prefunction

REFRESHMENT BREAK

11:40 AM – 12:00 PM

Grand Ballroom

GENERAL SESSION

Sustaining Your Growth for the Next Decade

Jim McCarthy, Head of Business Development & Field Training, Morgan Stanley Wealth Management

12:00 PM – 1:05 PM

Grand Ballroom

LUNCH

1:05 PM – 1:55 PM

Grand Ballroom

GENERAL SESSION

Leveraging Volatility to Boost After-Tax Returns

Adam Epstein, Managing Director, UBS Private Wealth Management

Robert Holderith, Head of PGIM Custom Harvest, PGIM Investments

Curt Rubinas, Managing Director, UBS Private Wealth Management

Moderator: **Raj Sharma**, Managing Director, Merrill Lynch Private Wealth Management

CFP IWI

1:55 PM – 2:10 PM

Grand Ballroom Prefunction

REFRESHMENT BREAK

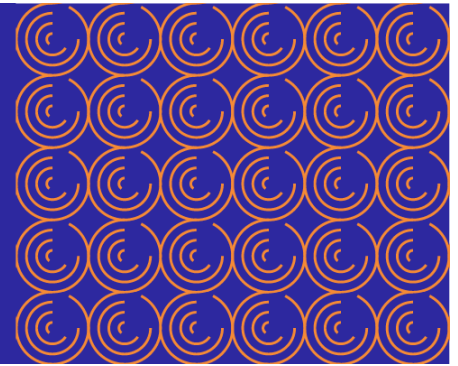
2:10 PM – 3:00 PM

BREAKOUTS

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100 SUMMIT

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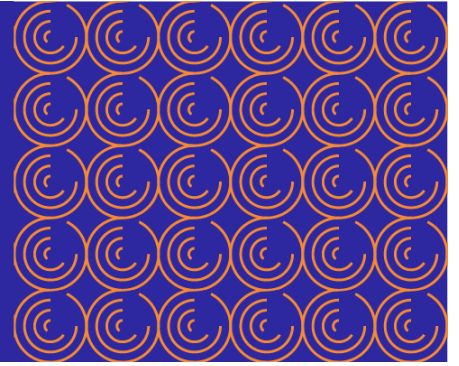
Grand Ballroom A	Moving from the Advisor to CEO Mindset Shirl Penney , President & Chief Executive Officer, Dynasty Financial Partners	
Grand Ballroom D	Multi-Generational Wealth Planning - Planning for Today, Tomorrow and Generations to Come Lisa Detanna , Raymond James Rick Jones , Merrill Lynch Wealth Management Moderator: Kenneth Correa , Managing Director, Merrill Lynch Wealth Management	
Venezia	Fixed Income 2023- Making Sense of the Abnormal and Revisiting the Math Paul McGinn , Senior Vice President, Fixed-Income Strategy, First Trust Interviewer: Gary Swearingen , Managing Partner, SC3F Wealth Management	CFP IWI
3:00 PM – 3:15 PM	REFRESHMENT BREAK	
Grand Ballroom Prefunction		
3:15 PM – 4:05 PM	BREAKOUTS	
Grand Ballroom A	Smart Strategies for Strategic Planning & Teaming Brie Williams , Head of Practice Management, State Street Global Advisors	
Grand Ballroom D	How to Serve Next-Gen Clients — And Prepare Next-Gen Advisors Tom Riemann , Head of Wealth Solutions, Global Business Intelligence, J.D. Power	IWI
Venezia	Where to Find Value Amid High Inflation and Volatility Christian Heck , Portfolio Manager, Associate Director of Research and Senior Research Analyst, First Eagle Investments Interviewer: Peter Monty , Regional Director, First Eagle	CFP IWI
4:05 PM – 4:20 PM	REFRESHMENT BREAK	
Grand Ballroom Prefunction		
4:20 PM – 5:00 PM	GENERAL SESSION	
Grand Ballroom	A Conversation With Michael Wilbon Michael Wilbon , Pardon The Interruption Co-Host; NBA Countdown Analyst; Columnist, ESPN.com and The Undeclared Interviewer: Matt Barthel , Barron's Wealth & Asset Management Group	

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BARRON'S
ADVISOR

100 SUMMIT

January 18-20, 2023 | Salt Lake City, UT January 24-26, 2023 | Virtual



5:00 PM – 6:00 PM

COCKTAIL RECEPTION

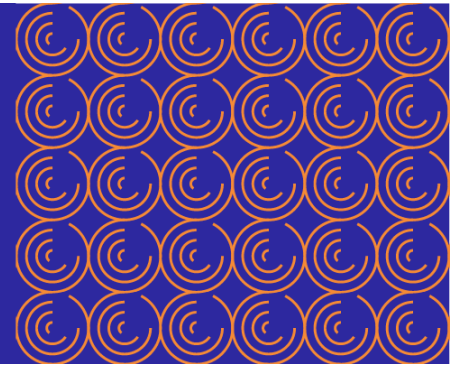
Grand Ballroom Reception

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100 SUMMIT

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FRIDAY, JANUARY 20, 2023

7:30 AM – 11:00 AM REGISTRATION

Grand Ballroom Prefunction

7:30 AM – 8:30 AM BREAKFAST

Grand Ballroom Prefunction

8:30 AM – 9:20 AM GENERAL SESSION

Grand Ballroom

Active vs. Passive: More of the Same or Will Active Finally Shine?

Holly Newman Kroft, Neuberger Berman
Ron Vinder, Morgan Stanley Private Wealth Management
Moderator: **Wendy Strutt**, SVP, Head of US Accounts, PGIM

CFP IWI

9:20 AM – 9:40 AM

Grand Ballroom

GENERAL SESSION

Outlook for the Economy & Markets in 2023: Where to be Opportunistic, Where to Tread Carefully

Chris Hyzy, Managing Director, Chief Investment Officer, Merrill and Bank of America Private Bank

9:40 AM – 10:20 AM

Grand Ballroom

GENERAL SESSION

Investing Amidst Entropy - How to Invest in a World Defined By Flux

Ronald S. Baron, Founder, Baron Capital
Interviewer: **Jack Otter**, Barron's Wealth & Asset Management Group

IWI

10:20 AM – 10:30 AM

Grand Ballroom Prefunction

REFRESHMENT BREAK

10:30 AM – 11:20 AM

Grand Ballroom

GENERAL SESSION

Navigating Turbulent Markets - Exhibits, Illustrations & Ideas to Help Clients Keep Emotions in Check

Chris Davis, Chairman and PM, Davis Advisors

CFP IWI

11:20 AM – 12:00 PM

Grand Ballroom

GENERAL SESSION

Show, Don't Tell: What It Means to Be a Motivational Leader.

Cassi Chandler, Motivational Leadership Expert, FBI's First African American Female Special Agent Assistant Director

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