

TEAMS SUMMIT

May 8-10, 2023 | The Bellagio, Las Vegas

- Leading Your Team
- Growth Imperatives
- Current Market Outlooks
- People, Relationships & Staffing
- Advisor & Team Highlights

MONDAY, MAY 8, 2023

1:00 PM – 3:00 PM

Grand Ballroom 6

EXHIBITOR CHECK-IN

Monet 2

TEAM CHECK-IN

2:00 PM – 4:00 PM

Monet 2

PRE-CONFERENCE SESSION

How Top Advisors Are Approaching Crypto and Blockchain With Their Clients

CFP IWI

Ana De Sousa, President, Agio Ratings
Matt Hougan, Chief Investment Officer, Bitwise Asset Management
Mick McLaughlin, Chief Distribution Officer, Bitwise Asset Management
Andy Serwer, Editor At Large, Barron's

4:00 PM – 7:00 PM

Grand Ballroom 6

REGISTRATION

ALL ATTENDEE REGISTRATION & CHECK-IN

5:00 PM – 6:00 PM

Grand Ballroom 6

COCKTAIL RECEPTION

6:00 PM – 8:00 PM

Grand Ballroom

WELCOME DINNER & SPEAKER

The Mental Aspects of Peak Performance

Wendy Borlabi, High-Performance Expert, Director of Performance and Mental Health, The Chicago Bulls
Interviewer: **Kenneth Correa**, Managing Director, National Business Development Executive, Merrill Lynch Wealth Management

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TUESDAY, MAY 9, 2023

7:45 AM – 6:00 PM

REGISTRATION

Grand Ballroom 6

7:45 AM – 8:45 AM

BREAKFAST

Grand Ballroom 6

8:45 AM – 9:35 AM

GENERAL SESSION

Grand Ballroom

The Morning News With Barron's

Michael Pinkerton, Associate Analyst, T Rowe Price

Danielle Poli, Co-Portfolio Manager, Oaktree Diversified Income Fund

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

CFP IWI

9:35 AM – 9:50 AM

REFRESHMENT BREAK

Grand Ballroom 6

9:50 AM – 10:40 AM

BREAKOUTS

Monet 2

• How to Shift from Advisor to Advocate

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

Grand Ballroom 1

• Pathways To Growth

Max McQuiston, Senior Vice President, Advisor Practice Management Consultant, Capital Group

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Grand Ballroom 4

• Three Timely Topics on International Markets

Adrian Jones, Portfolio Manager, Senior Research Analyst, First Eagle Investments

Interviewer: **Michael Schaffer**, Senior Financial Advisor - Managing Director - Investments, Wells Fargo Advisors

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Monet 4

• The Best Compensation Structures to Incentivize Growth (While Keeping Your Team's Culture)

Amy Parvaneh, Founder & CEO, Select Advisors Institute

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Grand Ballroom 8

• Maximizing Opportunities when Covering Clients Globally

John Goodwin, Morgan Stanley Private Wealth Management

Miguel Osio, Morgan Stanley Private Wealth Management

Patrick Wall, Morgan Stanley Private Wealth Management

Moderator: **Jessie Barrett**, Wells Fargo Advisors

10:40 AM – 10:55 AM

REFRESHMENT BREAK

Grand Ballroom 6

10:55 AM – 11:45 AM

BREAKOUTS

Grand Ballroom 1

• Understanding Sleep (and anxiety) for Optimal Performance

Melissa Milanak, Ph.D., Founder, MIND Impact Consulting

Monet 2

• How to Leverage Technology to Create and Optimize Planning Efficiencies

Andrew Altfest, Altfest Personal Wealth Management

Sarah Mouser, Cassaday & Company Inc.

Kathryn Thompson, Merrill Lynch Wealth Management

Moderator: **Kristie Edling-Day**, EVP, CIO Advisor Experience, LPL Financial

IWI

Grand Ballroom 4

• How To Position Portfolios In The Second Half Of 2023

Mo Haghbin, Head of Investment Solutions, Multi-Asset Strategies, Invesco

Moderator: **Joseph Dunn**, First Vice President, Private Wealth Advisor, Family Wealth Director, Morgan Stanley Private Wealth Management

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Grand Ballroom 8

• Thinking Differently: Why Teams are Hiring Estate Planning Attorneys to Help Position their Firms for the Future

Tom Palecek, Summit Trail Advisors

Andrea Sanft, Thinking Differently: Why Teams are Hiring Estate Planning Attorneys to Help Position their Firms for the Future, Morgan Stanley Private Wealth Management

Erin Scannell, Ameriprise Financial

Moderator: **Casey McKeon**, Senior Vice President, Relationship Management, Dynasty Financial Partners, Dynasty Enterprise Group

Monet 4

• Building a Complex Team For Growth

Mark Curtis, Building a Complex Team For Growth, Graystone Consulting, a business of Morgan Stanley

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

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11:45 AM – 11:55 AM

REFRESHMENT BREAK

Grand Ballroom 6

11:55 AM – 1:05 PM

LUNCH

Grand Ballroom

Lunch tables will be assigned based on your position/department. Please find the corresponding table where you can network and mingle with your peers.

1:05 PM – 1:55 PM

GENERAL SESSION

Grand Ballroom

The End of the Free Money Era: Exhibits, Illustrations & Ideas to Help Clients Navigate the Coming Decade

Chris Davis, Chairman and PM, Davis Funds

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1:55 PM – 2:05 PM

REFRESHMENT BREAK

Grand Ballroom 6

2:05 PM – 2:55 PM

BREAKOUTS

Monet 2

• **The Entrepreneurial Path: Articulating the Origin Story, Vision, and Drive**

Shirl Penney, President & Chief Executive Officer, Dynasty Financial Partners

Interviewer: **Brian Hamburger**, President & CEO, MarketCounsel | HamburgerLaw

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Monet 4

• **A Clear Path to Increased Team Efficiency**

Ben Alge, Divisional Vice President, Touchstone Investments

CFP

Grand Ballroom 1

• **Demographics, Destiny, and Doubling Your Practice**

David Allen, CFA, Institutional Financial Professional and Board Member, CFA NY

Ruth Shaber, MD, Co-Author of The XX Edge and President Tara Health Foundation, Tara Health Foundation

Moderator: **Robyn Russell**, Senior Director, Gender Diverse Investing Collective

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Grand Ballroom 4

• **Don't Be Afraid to Let Your Team Have Fun: They'll Be Happier, More Loyal, and More Trusting**

Anne Witherspoon, COO and CXO, Messick Peacock & Associates

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Grand Ballroom 8

• **Culture Is Everything: Get This Right and Business Will Follow**

Wendy Holmes, UBS Private Wealth Management

Katie Jones, UBS Private Wealth Management

Cameron McCurry, UBS Private Wealth Management

Moderator: **Eric Sheikowitz**, Senior Managing Partner, Focus Partners LLC

2:55 PM – 3:10 PM

REFRESHMENT BREAK

Grand Ballroom 6

3:10 PM – 4:00 PM

BREAKOUTS

Monet 2

• **How to Lead a Team Effectively by Knowing How to Communicate and When to Delegate**

Beverly Flaxington, Bestselling & Gold-Award Winning Author, The Collaborative

Monet 4

• **The Top Three Things Facing Top Teams**

Mark Douglass, Morgan Stanley Private Wealth Management

Peter Rukeyser, UBS Private Wealth Management

Grand Ballroom 1

• **Become Irreplaceable By Being Indispensable: How to Take Client Services to the Next Level**

Carmen Bississo, Cassaday & Company Inc.

Seth Finkel, Neuberger Berman

Charles Parry, Managing Director-Investments, Wells Fargo Advisors

Moderator: **Bill Comfort**, Independent LTC Specialist, Comfort Long Term Care

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Grand Ballroom 4

• **Why I Find You Irritating; Navigating Generational Friction at Work**

Chris DeSantis, Organizational Behavior Expert, Columbia Threadneedle

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Grand Ballroom 8

• **New Wave: How Younger Advisors are Building the Next Generation of Advisory Teams**

James Kaufman, Merrill Lynch Wealth Management

Jordan Perelle, Senior Vice President, Wealth Management Advisor, Merrill Lynch Wealth Management

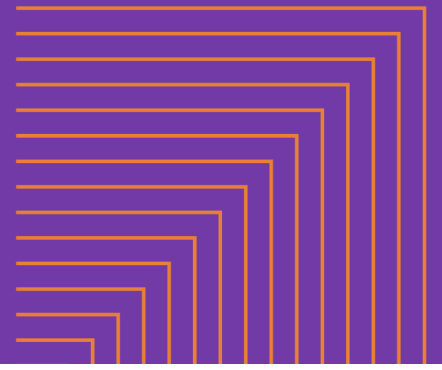
Chad Pigg, Merrill Lynch Wealth Management

Travis Wilson, Merrill Lynch Wealth Management

Moderator: **Emily Fletcher**, Senior Financial Advisor, Managing Director, Merrill Lynch Wealth Management

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4:00 PM – 4:15 PM

Grand Ballroom 6

REFRESHMENT BREAK

4:15 PM – 5:00 PM

Grand Ballroom

GENERAL SESSION

Erin Andrews, Sports Broadcaster, Entrepreneur, Podcast Host
Matt Barthel, Executive Editor, Barron's Wealth & Asset Management Group

5:00 PM – 6:00 PM

Grand Ballroom 6

COCKTAIL RECEPTION

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WEDNESDAY, MAY 10, 2023

7:00 AM – 11:00 AM

REGISTRATION

Grand Ballroom 6

7:00 AM – 8:00 AM

BREAKFAST

Grand Ballroom 6

8:00 AM – 8:20 AM

GENERAL SESSION

Grand Ballroom

The New Team Dynamic. Enabling Large Teams to Grow Larger.

Wil Byers, Merrill Lynch Private Wealth Management

Richard Jones, Merrill Lynch Private Wealth Management

Cheryl Smith, Merrill Lynch Private Wealth Management

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

8:20 AM – 9:10 AM

GENERAL SESSION

Grand Ballroom

Leadership Excellence

Jay Therrien, Managing Director of Executive Consulting, Invesco

IWI

9:10 AM – 9:20 AM

REFRESHMENT BREAK

Grand Ballroom 6

9:20 AM – 10:10 AM

GENERAL SESSION

Grand Ballroom

Seven Part Roadmap for Success In Succession

Ray Sclafani, Founder & CEO, ClientWise LLC

IWI

10:10 AM – 11:00 AM

GENERAL SESSION

Grand Ballroom

Securing Your Organization's Information in the Digital Age

Rachel Wilson, Head of Wealth Management Data Security & Infrastructure Risk, Morgan Stanley

CFP IWI

11:00 AM – 11:01 AM

CLOSING REMARKS

Grand Ballroom

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