SESSIONS

DAY ONE - 26/01/2020

ETFs 101

2:00pm - 2:20pm
ETF University - Location: Regency Ballroom

Exchange-traded funds have transformed the investment landscape, playing a key role in any investment strategy, yet the need for education has never been greater. Inside ETFs CEO John Swolfs explains how ETFs really work, and where the true risks and opportunities lie, leaving you with a framework to pick the right ETF every time.

Participants

Speaker: John Swolfs - CEO, Inside ETFs

Unwrapping the ETF Rule & Its Impact

2:00pm - 2:40pm
The ETF Industry Summit - Location: Atlantic Ballroom 1

The recent ruling from the SEC has levelled the playing field, lowered costs and shortened the runway to launch. Will these changes invite new players into the ETF market? This opening panel takes a deep dive into uncovering the nuances of this rule and how to best play in this new framework for launching an ETF.

Participants

Moderator: Dave Nadig - CIO, ETF Trends, ETF Trends

Panelist: Jane Heinrichs - Associate General Counsel, Investment Company Institute

Panelist: Mike Mundt - Partner, Stradley Ronon Stevens & Young

Introduction to Blockchain and Digital Assets -- Just another Tulip Bulb? Or Global Transformation?

2:00pm - 2:30pm
Digital Assets Explained - Location Atlantic Ballroom 2

Is Bitcoin just another pump-and-dump scheme? Or will this revolutionary technology transform commerce on a planetary scale? As a financial advisor, you must become knowledgeable about the blockchain, as well as bitcoin and other digital assets, so you can decide whether your clients should invest – or stay away.

Everyone knows about bitcoin's massive volatility. But few can explain the blockchain, bitcoin's underlying technology. This vital session will remove the mystery about these innovative technologies, enabling you to have meaningful conversations with your clients about blockchain and digital assets – while also helping you learn the implications for your own advisory practice.

Participants

Speaker: Ric Edelman - Founder, RIA Digital Assets Council

ETFs 201: Factors, Fixed Income & Alternative ETFs Explained

2:20pm - 2:45pm
ETF University - Location: Regency Ballroom

As ETFs have grown in popularity, so has their complexity. Making sense of it all can feel overwhelming. ETF veteran and product expert Todd Rosenbluth of CFRA shares how they break down, classify and segment ETFs to help advisors better understand them.

Participants

Speaker: Todd Rosenbluth - Sr. Director, ETF & Mutual Fund Research, CFRA

Bitcoin in 2020: New Data On How And Why Financial Advisors Are Incorporating Crypto InTo Client Portfolios

2:30pm - 3:00pm
Digital Assets Explained - Location Atlantic Ballroom 2

In this stand-alone session, Inside ETFs Chairman and Bitwise Global Head of Research Matt Hougan will reveal new data from a survey of more than 400 financial advisors revealing both how, why and where advisors are incorporating crypto into client portfolios. Hougan will also examine the key developments in the crypto market in 2019 that are driving increased adoption by advisors, and what to look for in the year ahead.

Participants

Speaker: Matt Hougan - Chairman, Inside ETFs

Getting Digi With It: A Conversation with a Digital Distribution Expert

2:40pm - 3:00pm
The ETF Industry Summit - Location: Atlantic Ballroom 1

The days of relying on banners ads and pop-ups are long gone, but with so many places for potential customers to consume digital content, how do you find and target them? Hear from our marketing expert as they walk you through the do's and don'ts of digital marketing, helping you to streamline your efforts and get the right eyes on your ads

Participants

Tom Lydon - CO-CEO, ETF Trends & ETF Database, ETF Trends

Matt Schiffman - Principal, Distribution Insight, Broadridge

ETFs 301: Effectively Trading ETFs

2:45pm - 3:10pm
ETF University - Location: Regency Ballroom

The need for human interaction in ETF trading is being marginalized, but is that the right approach? Learn how to work your order, trade inside the spread and save your clients money. Leading ETF market markers pull back the curtain and answer all your ETF trading questions in this audience-led interactive session.

Participants

Speaker: David Abner - President, Dabner Capital Partners

Speaker: James Seyffart - ETF & Commodities Analyst, Bloomberg

Empowering ETF Growth Through Market Modernization

3:00pm - 3:30pm
The ETF Industry Summit - Location: Atlantic Ballroom 1

The U.S. ETF market has seen tremendous growth. As assets and trade volumes have accelerated, so has the need for solutions that drive further efficiencies in the primary markets. Join Head of ICE ETF Hub Peter Borstelmann as he highlights the benefits of the new ICE ETF Hub, focused on improving order entry and facilitating the creation and redemption process -- all while helping push growth forward in the ETF industry.

Participants

Peter Borstelmann - Head of ICE ETF Hub, NYSE: ICE

Tax and Regulatory Issues

3:00pm - 3:30pm
Digital Assets Explained - Location Atlantic Ballroom 2

The SEC says bitcoin is not a security, and the Federal Reserve says bitcoin is not currency. The IRS says bitcoin is property subject to taxation, but the CFTC says bitcoin is a commodity. What's a taxpayer to do? Currently, there's little federal regulation over bitcoin – allowing a Wild West environment to flourish. Five companies have asked the SEC for permission to launch a bitcoin ETF. Will the agency approve the applications? This session examines the crucial tax and regulatory status, to help you manage your practice and provide guidance to your clients.

Participants

Panelist: Joel Telpner - Partner, Sullivan & Worcester LLP

Panelist: Craig Salm - Director, Legal, Grayscale Investments

Panelist: Brett Cotler - Tax Attorney, Seward & Kissel LLP

SESSIONS

DAY ONE - 26/01/2020

Inside ETFs

January 26 - 29, 2020
Diplomat Beach Resort
Hollywood, Florida

ETFs 401: A New Kind of Active ETFs – The Precidian Model & What It Means to Your Portfolio

3:10pm - 3:30pm
ETF University - Location: Regency Ballroom

The Precidian model has garnered more than its fair share of headlines since its SEC approval. With licensees representing almost $12Trillion in assets, what do the worlds' largest asset managers know that you should know?

Participants

Speaker: Stuart Thomas, - Founding Principal, Precidian Investments

Networking Break

3:30pm - 4:00pm
ETF University - Location: Regency Ballroom

Networking Break

3:30pm - 4:00pm
The ETF Industry Summit - Location: Atlantic Ballroom 1

Networking Break

3:30pm - 4:00pm
Digital Assets Explained - Location Atlantic Ballroom 2

The High Price Of Low Volatility ETF Investing

4:00pm - 4:25pm
ETF University - Location: Regency Ballroom

Trade wars. Interest rate uncertainty. Slowing economic growth. As risks grow, investors seek out ways to protect their capital from potential loss. Low Volatility ETFs have historically served as a vacation spot for investors seeking to wait out periods of market uncertainty. But could they be swapping out one set of risks for another? Are there more efficient ways for investors to use ETFs to manage portfolio risk than Low Volatility options? Join us as we examine some of the little known hazards that accompany traditional Low Volatility investing – and explore more proficient ways to use ETFs in client portfolios if go–forward risks are top of mind.

Participants

Speaker: Brian Kraus - Product Specialist Director, Investment Consulting Group, Hartford Funds

A Transparent Look at Nontransparent ETFs

4:00pm - 4:30pm
The ETF Industry Summit - Location: Atlantic Ballroom 1

The recent SEC approval of nontransparent ETFs is a game changer. Will they offer new, broader horizons for the market, or do they run the risk of damaging the good reputation of ETFs if they fail to deliver on returns? Our expert panelists explore the powerful potential and possible pitfalls of this new model, which looks set to disrupt the ETF landscape as we know it.

Participants

Moderator: Daniil Shapiro - Associate Director, Product Development, CERULLI ASSOCIATES

Panelist: Brian McCabe - Partner, Ropes & Gray LLP

Panelist: Nick Elward - Senior Vice President, Head of Institutional Product & ETFs, Natixis Investment Managers

Investing Opportunities in Blockchain and Digital Assets

4:00pm - 4:35pm
Digital Assets Explained - Location Atlantic Ballroom 2

With virtually any computer, you can mine bitcoin on your own, like picking apples from a tree. Or you can buy bitcoins from an online exchange, like buying stocks at a brokerage firm. You can also invest in funds that buy digital assets, or acquire a stake in companies that are building blockchain technology. This session will show you the wide variety of investment opportunities available for you and your clients – and how to incorporate these strategies into your practice.

Participants

Moderator: David Abner - President, Dabner Capital Partners

Panelist: Jake Ryan - Founder & CIO, Tradecraft Capital

Panelist: Michael Sonnenshein - Managing Director, Grayscale Investments

Building A Fixed Income Portfolio for Tomorrow, Today

4:25pm - 4:50pm
ETF University - Location: Regency Ballroom

Bonds play a critical role in portfolios, even as interest rates move and fears of an equity market downturn intensify. In this session, J.P. Morgan will share a time-tested, strategic framework (the "fixed income triangle") to help investors construct strong fixed income portfolios and achieve their fixed income goals: generating income and reducing overall portfolio volatility.

Participants

Speaker: Priscilla Hancock - Managing Director, Head of the Fixed Income Insights Team, JP Morgan Asset Management

Launching Outside the US: What You Need to Know

4:30pm - 5:10pm
The ETF Industry Summit - Location: Atlantic Ballroom 1

It's no secret that the U.S. ETF market is overcrowded. Recent survey results indicate ETF usage in Asia and Europe is set for historic growth, with ETFs accounting for more than 20% of all asset allocations by 2024. Our global ETF expert brings these markets to life with their step-by-step guide to transplanting your ETF abroad.

Participants

Moderator: Chris Sullivan - President, MacMillan Sullivan Communications

Panelist: Brian Higgins - Partner, Asset Management and Investment Funds, Dillion Eustace

Panelist: Jorge Fernandez Revilla - Partner, KPMG in Ireland

Panelist: Robert Rushe - Head of ETF Services, EMEA, BNY Mellon

SESSIONS

DAY ONE - 26/01/2020

Digital Assets: Is it an Alternative Asset Class? -- Portfolio Diversification in the Digital Age

4:35pm - 5:10pm
Digital Assets Explained - Location Atlantic Ballroom 2

If you want to recommend digital assets to your clients, how would you go about it? Which digital assets would you recommend, and to what degree? In this session, you'll discover the options available to you, and how you can increase your client's portfolio diversification.

In an asset allocation model, should bitcoin be listed as equity, as debt – or as a completely new asset class? This remarkable session will tie together everything you've learned in today's program, and show you the two startling reasons why you should place digital assets into your clients' portfolios.

Participants

Speaker: Paul Cappelli - Portfolio Manager, Galaxy Digital LP

The Anatomy of a Recession: What to Look for and Where We're Headed

4:50pm - 5:10pm
ETF University - Location: Regency Ballroom

The secular bull market for U.S. stocks continues, but it's vital to know the warning signs that the markets could be losing steam. Join Legg Mason/ClearBridge Investments as we explore the complex relationship between market drawdowns and recessions, referencing the current state of the U.S. economy, presidential election year trends, easing central bank policies, the U.S. dollar, corporate earnings and the outlook for markets outside the U.S.

Participants

Speaker: Josh Jamner - Vice President, Investment Strategy Analyst, ClearBridge Investments

Closing Keynote: What It Takes to Be No. 1

5:10pm - 5:50pm
ETF University - Location: Regency Ballroom

What does it take to be No. 1? Perhaps no one knows that more than legendary tennis coach Nick Bollettieri. With over 4 decades of experience, he has coached more than 10 No. 1 world-ranked tennis professionals. Bollettieri understands what it takes to connect and get the best out of anyone. In this closing keynote, he shares what it takes to be No. 1 and will leave you inspired to take on and overcome the challenges your business faces.

Participants

Speaker: Nick Bollettieri - US Tennis Coach, Nick Bollettieri Tennis Academy

ETF Rebels: How to Compete in a World of Giants

5:10pm - 5:50pm
The ETF Industry Summit - Location: Atlantic Ballroom 1

Inside ETFs invites our band of misfits and trailblazers to tell their stories of how breaking the mould can lead to unlikely success. Learn from their greatest triumphs and most crushing defeats as they share their secrets to competing in a world dominated by size.

Participants

Moderator: Eric Balchunas - Senior ETF Analyst, Bloomberg Intelligence

Panelist: Dodd Kittsley - National Director, Davis Advisors

Panelist: William Rhind - Founder & CEO, GraniteShares

Panelist: Andrew Chanin - Co-Founder, Procure Holdings

The Inside ETFs ‘ Welcome to Florida’ Cocktail Reception

6:00pm - 7:30pm

Please join us for The Inside ETFs ‘ Welcome to Florida’ Cocktail Reception

Location: The Diplomats Iconic “Hotel Bar”

SCHEDULE

DAY ONE - 26/01/2020

Inside ETFs

January 26 - 29, 2020
Diplomat Beach Resort
Hollywood, Florida

TIME	DIGITAL ASSETS EXPLAINED - LOCATION ATLANTIC BALLROOM 2	ETF UNIVERSITY - LOCATION: REGENCY BALLROOM	THE ETF INDUSTRY SUMMIT - LOCATION: ATLANTIC BALLROOM 1
2:00PM	**2:00pm** - Introduction to Blockchain and Digital Assets -- Just another Tulip Bulb? Or Global Transformation? **2:30pm** - Bitcoin in 2020: New Data On How And Why Financial Advisors Are Incorporating Crypto InTo Client Portfolios	**2:00pm** - ETFs 101 **2:20pm** - ETFs 201: Factors, Fixed Income & Alternative ETFs Explained **2:45pm** - ETFs 301: Effectively Trading ETFs	**2:00pm** - Unwrapping the ETF Rule & Its Impact **2:40pm** - Getting Digi With It: A Conversation with a Digital Distribution Expert
3:00PM	**3:00pm** - Tax and Regulatory Issues **3:30pm** - Networking Break	**3:10pm** - ETFs 401: A New Kind of Active ETFs – The Precidian Model & What It Means to Your Portfolio **3:30pm** - Networking Break	**3:00pm** - Empowering ETF Growth Through Market Modernization **3:30pm** - Networking Break
4:00PM	**4:00pm** - Investing Opportunities in Blockchain and Digital Assets **4:35pm** - Digital Assets: Is it an Alternative Asset Class? -- Portfolio Diversification in the Digital Age	**4:00pm** - The High Price Of Low Volatility ETF Investing **4:25pm** - Building A Fixed Income Portfolio for Tomorrow, Today **4:50pm** - The Anatomy of a Recession: What to Look for and Where We're Headed	**4:00pm** - A Transparent Look at Non-transparent ETFs **4:30pm** - Launching Outside the US: What You Need to Know
5:00PM		**5:10pm** - Closing Keynote: What It Takes to Be No. 1	**5:10pm** - ETF Rebels: How to Compete in a World of Giants
6:00PM	**6:00pm** - The Inside ETFs ' Welcome to Florida' Cocktail Reception	**6:00pm** - The Inside ETFs ' Welcome to Florida' Cocktail Reception	**6:00pm** - The Inside ETFs ' Welcome to Florida' Cocktail Reception

SESSIONS

DAY TWO - 27/01/2020

Inside ETFs

January 26 - 29, 2020
Diplomat Beach Resort
Hollywood, Florida

Breakfast Workshop: Women in ETFs "The Essential Leader Toolkit

7:00am - 8:30am
Breakfast Workshop 1 - Location: Atlantic 1

Please join Women in ETFs for its 7th Annual Inside ETFs Breakfast, where we will host a distinguished keynote speaker for a discussion focused on Leadership

Pre-registration required. Follow the link :-

Register here

Participants

Speaker: Amy Jen Su , Author: The Leader You Want to be: Five Essential Principles to Bring Out Your Best Self'

Welcome to Inside ETFs 2020

9:00am - 9:05am
Main Session

Participants

Presenter: John Swolfs - CEO, Inside ETFs

Chairperson Remarks

9:05am - 9:10am
Main Session

Participants

Presenter: Noni Robinson - Principal, Head of Bank and Institutional, Financial Advisor Services, Vanguard

Opening Keynote Address: The End of the New Normal.

9:10am - 9:40am
Main Session

The persistent downturn in productivity growth during the past two decades has cast doubts on economic prospects. But Vanguard has uncovered cause for optimism in demonstrating that productivity is fundamentally driven by the generation and expansion of ideas. Vanguard's research tells us that while there will always be challenges in the markets, soon the low-growth environment will not be one of them.

Participants

Presenter: Joe Davis, Ph.D. - Global Chief Economist & Head of Investment Strategy Group, Vanguard

Future Forward: The Next Wave of ETF Investing

9:40am - 10:40am
Main Session

Are ETFs becoming a victim of their own success? 2019 saw continuation of fee wars, and consolidation as we race to a zero-fee investment world. What's in store for 2020? An annual tradition, Inside ETFs gathers the giants of the ETF universe for a frank discussion on the future of ETFs and potential pitfalls.

Participants

Moderator: Rachel Evans - Head of ETF coverage, Bloomberg News

Panelist: Dan Draper - Managing Director and Global Head of ETFs, Invesco

Panelist: Robert Hughes - Global Head of Nasdaq Investment Solutions, Nasdaq Global Information Services

Panelist: Luke Oliver - Head of Index Investing, Americas, DWS Distributors, Inc.

Panelist: Ed Rosenberg - Senior Vice President, Head of ETFs, American Century Investments

Panelist: Sanjay Arya - Head of Morningstar Indexes, Morningstar

Panelist: Sue Thompson - Head of SPDR® Americas Distribution, State Street Global Advisors

Networking Break + ETF Launchpad

10:40am - 11:20am
Main Session

ETF Launchpad – The Best ETF Ideas You Never Heard Of
Building on the excitement of the Hidden Gems program Inside ETFs is excited to see our ETF Launchpad come to life. Whether you are looking for alpha, income or just want some downside protection the ETF Launchpad has the actionable trades to boost any portfolio for the year ahead.

ETF Featured:
HTEC

Participants

Presenter: Jay McAndrew - Vice President, National Sales Manager, Columbia Threadneedle Investments

Presenter: William Rhind - Founder & CEO, GraniteShares

Presenter: Chris Buck - Head of Sales & Capital Markets / Partner, ROBO Global

Presenter: Andrew Beer - Founder and Managing Member, Dynamic Beta Investments

State of the ETF Union.

11:20am - 11:50am
Main Session

State of the ETF union.
Non-transparent active, commission free trading, fractional shares and the rise of direct indexing. 2019 brought numerous shocks to the system, but what will all of these changes mean for real world advisors? Chaos and competition. Join the best session of the show, every year, to see how your practice will have to adapt to this brave new world.

Participants

Presenter: Matt Hougan - Chairman, Inside ETFs

Presenter: Dave Nadig - CIO, ETF Trends, ETF Trends

The New Direxion – The Evolution of Precision Investing 10 Questions in 20 Minutes

11:50am - 12:10pm
Main Session

You likely know Direxion as the creator of the 3X leveraged ETF, but are you aware of what else they offer? In this fast-paced session, we sit down with Rob Nestor, industry veteran and President of Direxion, to discuss the evolution of the ETF industry and how they are committed to developing new-age solutions designed to allow advisors to efficiently and precisely express their market perspectives.

Participants

Interviewee: Robert Nestor - President, Direxion

Interviewer: John Swolfs - CEO, Inside ETFs

Recession, Rate Cuts & Low Growth Environment: Time to Get Active?

12:10pm - 1:00pm
Main Session

It's a scary world, and for investors, uncertainty is the worst. But we have answers! Inside ETFs invites the brightest macro thinkers we know to debate, discuss and get you answers to where the markets are going over the next 18 months.

Participants

Moderator: Bob Pisani - 'On-Air Stocks' Editor, CNBC

Panelist: Brendan Ahern - Chief Investment Officer, KraneShares

Panelist: Sonal Desai - Executive Vice President & Chief Investment Officer, Franklin Templeton Fixed Income, Franklin Templeton

Panelist: Anne Mathias - Global Rates & Foreign Currency Senior Strategist, Fixed Income, Vanguard

Panelist: Emily Roland - Co-Chief Investment Strategist, John Hancock Investment Management

Panelist: Robert Carey - Chief Market Strategist, First Trust Portfolios L.P

SESSIONS

DAY TWO - 27/01/2020

Lunch & Learns: Grand Ballroom

1:05pm - 2:05pm

Digging Deeper – Exploring the Latest ETF Trends and Topics
Staying current on the ETF market is a full-time job and one that often gets overlooked as you spend time focused on your clients and their needs. With that in mind Inside ETFs has launched our Lunch & Learn series that allow you to get into the weeds on today's biggest trends and topics. Topics to be covered include:

A New Look At the Global Fixed Income Market -
Host Columbia Threadneedle Investments

Advisor as CEO -
Host: Fidelity Investments

Emerging Markets - New exposures with New Metrics
Host: Perth Tolle with Linda Zhang

The Role of the OCIO - A Conversation with Your Peer
Host: John Davi

Participants

Thought Leader: Jay McAndrew - Vice President, National Sales Manager, Columbia Threadneedle Investments

Thought Leader: Paul Ma - Vice President, Lead Portfolio Strategist, Fidelity Investments

Thought Leader: John Davi - Founder & Chief Investment Officer, Astoria Portfolio Advisors

Thought Leader: Perth Tolle - Founder of Life + Liberty Indexes, Life + Liberty Indexes

Thought Leader: Linda Zhang - Founder, Pureview Investments

Thematic ETFs: The Next Stage in ETF Evolution

2:05pm - 2:45pm
Track A - Location: Regency 1

Thinking outside the box is what made these niche products popular. But what defines a thematic ETF, and what's the next big idea to set the trend? Let our experts guide you on differentiating between a trend/fad and the best new ideas for 2020 and beyond.

Participants

Moderator: Cinthia Murphy - Managing Editor, ETF.com

Panelist: Aashu Virmani - CMO & EVP Sales, Fuzzy Logix

Panelist: Jay Gragnani - Head of Research and Client Engagement, Nasdaq Dorsey Wright

Panelist: Robert Schein - Managing Director, Partner, HighTower- Blanke Schein Wealth Management

Panelist: Steve Sachs - Global Head of ETF Capital Markets, GSAM ETFs, Goldman Sachs

Liquid Alternatives, Your Portfolio & the Future: What You Need to Know

2:05pm - 2:45pm
Track B - Location: Regency 2

In today's shifting economic and market environment, building portfolios to weather the storm is at the forefront of investors' minds. Liquid alternatives and other hedging vehicles might be the solution to making sure your risks are hedged and your returns optimized. We've got you covered in this not-to-miss session on what alternatives to consider and how to think about allocations.

Participants

Moderator: Vance Barse - Founder and Wealth Strategist, Your Dedicated Fiduciary

Panelist: Bill DeRoche - Chief Investment Officer & Head of AGFiQ Alternative Strategies, AGF Investments

Panelist: Phil Huber - CIO, Huber Financial Advisors

Panelist: Shana Sissel - Director of Investment Due Diligence & Senior Portfolio Manager, Orion Advisor Solutions

ESG ETFs: A Modern Day Approach to Managing Risk

2:05pm - 2:45pm
Track C - Location: Regency 3

While ESG investing can help clients align their investments with their personal values, it can also be an effective tool for managing risk and enhancing returns. We invited the smartest ESG experts we know to discuss how they're using the ESG lens to bring products to market that are more accurately aligned with client needs and desired outcomes.

Participants

Moderator: Rochelle (Shelly) Antoniewicz - Senior Director, Industry and Financial Analysis, Investment Company Institute

Panelist: Jordan Farris - Head of ETF Product Development, Nuveen

Panelist: Mona Naqvi - Senior Director, Product Management ESG Indices, S&P Dow Jones Indices

Panelist: Nathalie Wallace - Global Head of ESG Investment Strategy, State Street Global Advisors

Panelist: Robert Bush - Director, DWS Research Institute, DWS

Factors & Fixed Income: The Revolution Continues

2:05pm - 2:45pm
Track D - Location: Atlantic 3

Factor-focused products have more than gained their fair share of assets, but that has been mostly concentrated in equity-focused ETFs. Building on the success, issuers and investors have turned their attention to bonds. Will these new approaches change how investors think about bonds, or will the more traditional debt-weighted approach continue to dominate?

Participants

Moderator: Malik Sarwar - CEO, K2 Leaders

Panelist: Clayton Fresk - Portfolio Manager, Stadion Money Management

Panelist: Eric Isenberg - Executive Director, Head of Fixed Income Portfolio Management for Quantitative Beta Strategies, JP Morgan Asset Management

Panelist: JR Rieger - Bond Market Author, Speaker, and Owner, Rieger Report LLC

Panelist: Kim Escue - Senior Portfolio Manager, Stringer Asset Management, LLC

Why Your Custodian Matters More than You Think

2:05pm - 2:45pm
Peer-to-Peer - Location: Atlantic 2

When it comes to the success or failure of an ETF it can come down to who your partners are and how well they support your business. As ETFs grow in popularity and complexity the role of the custodian grows in importance. Hear from the leading ETF custodians as they share how they are fuelling future growth, supporting new issuers and keeping an eye to the future.

Participants

Moderator: Lara Crigger - Sr. Staff Writter, ETF.com

Panelist: Frank Koudelka - Senior Vice President and Global ETF Product Specialist, State Street Global Services

Panelist: Joe Rappa - Director, ETF Product Development, Custody and Fund Services, Citi

Panelist: Josh Jacobs - Executive Director, J.P. Morgan

Finding Riches in Niches – How Target Marketing can Empower Growth

2:05pm - 2:45pm
Advisor Accelerator - Location: Atlantic 1

In an increasingly customized world being a generalist may not be the best option for advisors looking to grow their practice. But how does one identify a niche, put a marketing plan in place and ultimately attract new clients? In this session, we answer those questions and more as we invite 3 veterans of niche marketing to share their stories and provide you with the insight to find your own niche.

Participants

Moderator: Kristen Luke - President, Kaleido Creative Studio

Panelist: Cathy Curtis - Founder, Curtis Financial Planning, LLC

Panelist: Stephanie Sammons - Founder, Sammons Wealth Management LLC

Panelist: Tanya Nichols - Founder & President, Align Financial

Factor Due Diligence: How to Get It Right

2:45pm - 3:25pm
Track A - Location: Regency 1

While factor investing is now widely accepted, many advisors and investors struggle with getting their due diligence and investment process buttoned up when it comes to truly understanding how factors work and where in your portfolio they fit.

Participants

Moderator: Lois Gregson - Senior Analyst, FactSet

Panelist: D.J. Tierney - Senior Client Portfolio Strategist, Charles Schwab Investment Management

Panelist: Matthew Bartolini - Head of SPDR® Americas Research, State Street Global Advisors

Panelist: Jason Stoneberg - Senior Director of ETF research and product development, Invesco

Panelist: Todd Rosenbluth - Sr. Director, ETF & Mutual Fund Research, CFRA

MLPs, Energy, and Infrastructure - The True Diversifiers

2:45pm - 3:25pm
Track B - Location: Regency 2

As markets tick higher and higher it is easy for one to lose focus on the need to be diversified. But how does one truly diversify a portfolio? In this session, we explore the benefits of MLPs, infrastructure, their place in your portfolio and why ETFs are the perfect vehicle to access these markets.

Participants

Panelist: Stacey Morris - Director of Research, Alerian

Panelist: Jeff Saut - Chief Market Strategist and Advisory Board Member, Capital Wealth Planning

Moderator: Drew Voros - Editor-in-Chief, ETF.com

Emerging Markets: Still a Viable Option for 2020?

2:45pm - 3:25pm
Track C - Location: Regency 3

Geopolitical shock waves have been posing risks for emerging markets for the better half of 2019. With no sign of trade wars ending, and globalization flattening, is this space still a viable option for investors, or is now the time to jump ship? Get first hand insight into how to ride the waves to secure your clients' portfolios.

Participants

Moderator: Sumit Roy - Analyst, ETF.com

Panelist: David Garff - President & CIO, Accuvest Global Advisors

Panelist: Dodd Kittsley - National Director, Davis Advisors

Panelist: Linda Zhang - Founder, Pureview Investments

Panelist: Perth Tolle - Founder of Life + Liberty Indexes, Life + Liberty Indexes

Ideas Beyond the FAANGS: Understanding Tech's Subsectors

2:45pm - 3:25pm
Track D - Location: Atlantic 3

With the DOJ turning its eye to the tech giants, could these market rock stars be forced to change how they do business? Leading tech thinkers and ETF providers gather to highlight where the new opportunities are and how to best access them.

Participants

Moderator: David Armstrong - Editor-in-chief and Executive Director of Content, Wealthmanagement.com

Panelist: Matthew Moberg - Vice President and Portfolio Manager, Franklin Equity Group, Franklin Templeton

Panelist: Stephen Weiss - Chief Investment Officer and Managing Partner, Short Hills Capital Partners LLC

Panelist: Vito Sciaraffia - Chief Investment Officer, Innealta Capital

Redefining Your Value as an Advisor

2:45pm - 3:25pm
Peer-to-Peer - Location: Atlantic 2

The role of the advisor has changed. Many advisors are struggling to articulate what it is they do and why they're so vital to their clients' financial wellness. Join a panel of your peers as they discuss the steps, they took to redefine their value proposition and how it changed their practice.

Participants

Moderator: Sheryl Hickerson - CEO,, Females and Finance, LLC

Panelist: Angela Moore - Financial Planner/Money Coach, Modern Money Advisor

Panelist: Bill Simonet - CERTIFIED FINANCIAL PLANNER, Simonet Financial Group, LLC

Panelist: Stoy Hall - Senior Wealth Advisor, Majors & Mondragon, LLC

Own your alpha: Advisor perspectives on how to become indispensable to clients

2:45pm - 3:25pm
Advisor Accelerator - Location: Atlantic 1

How can you deepen client relationships and deliver value well in excess of your fees? Vanguard Advisor's Alpha® provides advisor-tested tools to deliver on those objectives, and it's a powerful differentiator. But just how do you implement it? A panel of your peers reveal their techniques for coaching clients to smarter decisions, boosting referrals, and augmenting their firms with technology. Panelists are ready to answer your questions.

Participants

Moderator: Mike DiJoseph CFA - Senior Advice Strategist, Financial Advisor Services, Vanguard

Speaker: Kathleen Parks CFP - Senior Financial Advisor, Apella Capital

Speaker: Matt Westfall CFA - Director of Investment Operations, ARGI

Speaker: Walt Nockett CFA, CFP, AIR - Director, Portfolio Advisor, Sullivan Bruyette Speros & Blayney (SBSB)

Networking Break + Exhibit Hall Content

3:25pm - 4:00pm

New Ideas & New Investments - Ideas Worth Sharing

We all know that no investment approach works all the time, being flexible and looking at new options is difficult as we do not want to trend chase and worse try and time the markets. In this session, we focus on new ideas that are built to face the challenges of today's markets with an eye towards the future. These can't miss talks will leave you thinking about what the future holds and how to invest in it.

Topics:
Not So Passive: How Runaway Valuations of Tech Monopolies Present a Generational Risk to Your Portfolios

How to Access Niche Markets and Stay Liquid: Understanding ETNs

Accessing Ideas: How to Stay Current on the Latest Research and White Papers

Participants

Presenter: Rishi Rajan - Executive Director - Americas Head of Exchange Traded Notes, UBS

Presenter: Phil Bak - Chief Executive Officer, Exponential ETFs

Presenter: Stuart Blake - Business Development Manager, Savvy Investor

The Power of Inclusion & Equality: A New Approach to ETFs

4:00pm - 4:30pm
Main Session

ETFs were built on the idea of inclusion and equality for investors. Now that same principle has been put to work in an ETF. In this first of-its-kind session, we invite the brains and brawn behind this idea to share their story, and why we think this could change the game for how ETFs are conceived, built and brought to market.

Participants

Moderator: Jim Wiandt - President, SparkNetwork.com

Panelist: Barney Frank - Former U.S. Congressman (1981-2013), LGBTQ Loyalty Board Member

Panelist: Billy Bean - Vice President & Special Assistant to the Commissioner, Major League Baseball, LGBTQ Loyalty Board Member

Panelist: Nicole Douillet - Founder and Principal,, Crescita

New Approaches & New Solutions: Rethinking Bond Investing

4:30pm - 5:20pm
Main Session

Rate cuts, Trump's desire for a weaker dollar and the ominous warning of a global recession all serve as reminders that obtaining bond exposure can benefit any portfolio. We've pulled together the smartest fixed income leaders to identify the exposures that'll help you boost income and stay liquid.

Participants

Moderator: Annie Massa - Investing Reporter, Bloomberg News

Panelist: Jason Bloom - SENIOR DIRECTOR OF GLOBAL MACRO ETF STRATEGY, Invesco

Panelist: Michael Arone - Chief Investment Strategist for the SPDR® Americas Business, State Street Global Advisors

Panelist: Mark Lindbloom - Portfolio Manager, Western Asset Management Company

Panelist: Priscilla Hancock - Managing Director, Head of the Fixed Income Insights Team, JP Morgan Asset Management

Closing Keynote: Alpha Girls Winning Deals, Building Companies & Blazing Trails

5:20pm - 6:00pm
Main Session

Far too many industries have been male-dominated for too long, and while it was obvious to everyone, creating change was nearly impossible. Learn how 4 women took on the male culture of Silicon Valley and not only did they win but made the deals of a lifetime.

Participants

Moderator: Barry Ritholtz - Chairman & CIO, Ritholtz Wealth Management

Speaker: Julian Guthrie - Founder of Alpha Girls Institute, Alpha Girls

Speaker: Magdalena Yesil - Co-founder and Exec Chair of Informed Board Member of SoFi, Smartsheet, Zuora, Alpha Girls

Monday Night Reception

6:00pm - 7:00pm

Monday Night Pool Party!
Unwind and relax at the South Lagoon pool just feet from the beautiful Atlantic Ocean. Catch up on the day's hottest topics and news as we enjoy tasty bites, cold drinks and the warm air with your peers as day 1 comes to a close.

SCHEDULE

DAY TWO - 27/01/2020

Inside ETFs

January 26 - 29, 2020
Diplomat Beach Resort
Hollywood, Florida

TIME	ADVISOR ACCELERATOR - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 1 - LOCATION: ATLANTIC 1	MAIN SESSION	PEER-TO-PEER - LOCATION: ATLANTIC 2	TRACK A - LOCATION: REGENCY 1	TRACK B - LOCATION: REGENCY 2	TRACK C - LOCATION: REGENCY 3	TRACK D - LOCATION: ATLANTIC 3
7:00AM		**7:00am** - Breakfast Workshop: Women in ETFs "The Essential Leader Toolkit						
8:00AM								
9:00AM			**9:00am** - Welcome to Inside ETFs 2020 **9:05am** - Chairperson Remarks **9:10am** - Opening Keynote Address: The End of the New Normal. **9:40am** - Future Forward: The Next Wave of ETF Investing					
10:00AM			**10:40am** - Networking Break + ETF Launchpad					
11:00AM			**11:20am** - State of the ETF Union. **11:50am** - The New Direxion – The Evolution of Precision Investing 10 Questions in 20 Minutes					

SCHEDULE

DAY TWO - 27/01/2020

Inside ETFs

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12:00PM			**12:10pm** - Recession, Rate Cuts & Low Growth Environment: Time to Get Active?					
1:00PM	**1:05pm** - Lunch & Learns: Grand Ballroom	**1:05pm** - Lunch & Learns: Grand Ballroom	**1:05pm** - Lunch & Learns: Grand Ballroom	**1:05pm** - Lunch & Learns: Grand Ballroom	**1:05pm** - Lunch & Learns: Grand Ballroom	**1:05pm** - Lunch & Learns: Grand Ballroom	**1:05pm** - Lunch & Learns: Grand Ballroom	**1:05pm** - Lunch & Learns: Grand Ballroom
2:00PM	**2:05pm** - Finding Riches in Niches – How Target Marketing can Empower Growth **2:45pm** - Own your alpha: Advisor perspectives on how to become indispensable to clients			**2:05pm** - Why Your Custodian Matters More than You Think **2:45pm** - Redefining Your Value as an Advisor	**2:05pm** - Thematic ETFs: The Next Stage in ETF Evolution **2:45pm** - Factor Due Diligence: How to Get It Right	**2:05pm** - Liquid Alternatives, Your Portfolio & the Future: What You Need to Know **2:45pm** - MLPs, Energy, and Infrastructure - The True Diversifiers	**2:05pm** - ESG ETFs: A Modern Day Approach to Managing Risk **2:45pm** - Emerging Markets: Still a Viable Option for 2020?	**2:05pm** - Factors & Fixed Income: The Revolution Continues **2:45pm** - Ideas Beyond the FAANGS: Understanding Tech's Subsectors
3:00PM	**3:25pm** - Networking Break + Exhibit Hall Content	**3:25pm** - Networking Break + Exhibit Hall Content	**3:25pm** - Networking Break + Exhibit Hall Content	**3:25pm** - Networking Break + Exhibit Hall Content	**3:25pm** - Networking Break + Exhibit Hall Content	**3:25pm** - Networking Break + Exhibit Hall Content	**3:25pm** - Networking Break + Exhibit Hall Content	**3:25pm** - Networking Break + Exhibit Hall Content
4:00PM			**4:00pm** - The Power of Inclusion & Equality: A New Approach to ETFs **4:30pm** - New Approaches & New Solutions: Rethinking Bond Investing					

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5:00PM			**5:20pm** - Closing Keynote: Alpha Girls Winning Deals, Building Companies & Blazing Trails					
6:00PM	**6:00pm** - Monday Night Reception	**6:00pm** - Monday Night Reception	**6:00pm** - Monday Night Reception	**6:00pm** - Monday Night Reception	**6:00pm** - Monday Night Reception	**6:00pm** - Monday Night Reception	**6:00pm** - Monday Night Reception	**6:00pm** - Monday Night Reception

3rd Annual Inside ETFs Fun-Run

6:30am - 8:00am

It's never too early to get in shape for a good cause! Join us for the 23rd annual Inside ETFs Fun Run, proudly brought to you by John Hancock. All proceeds from this event will benefit the lifesaving work of Save the Children, an international children's relief organization determined to ensure every child around the world has a healthy start, a safe environment and the opportunity to learn.

Follow the link to register :-

Register here

Breakfast Workshop: Do You Know What Drives Returns in Your Portfolio

8:00am - 8:50am
Breakfast Workshop 1 - Location: Atlantic 1

In-depth analysis. Actionable insights. Stronger portfolios. Want to identify what's driving risk and returns in your portfolio? Do you know how your portfolio will react during volatile markets? Ever wonder how your portfolio compares to your peers? J.P. Morgan's award winning Portfolio Insight suite enables financial advisors to build stronger portfolios that can navigate any market. J.P. Morgan analyzes over 25,000 portfolios a year, allowing us to derive real insights into how advisors are constructing portfolios. Our experts will discuss current portfolio trends and provide actionable insights for you to use within your practices.

Participants

Panelist: Heather Beamer - Executive Director, U.S. Portfolio Insights Team, JP Morgan Asset Management

Panelist: Josh Rogers - Executive Director, Beta Specialist, J.P. Morgan Asset Management

Breakfast Workshop: Roundtable discussions – Insights from 10 ETF issuers

8:00am - 8:50am
Breakfast Workshop 2 - Location: Regency 2

Start your day with an interactive round table breakfast, courtesy of FTSE Russell and 10 industry leaders from a variety of ETF issuers.

Each round table will be hosted and moderated by a subject matter expert from one of 10 different ETF issuers, allowing for an insightful and engaging discussion with you on a unique range of topics to build a comprehensive overview of ETFs and their benchmark indexes.

• There will be two 20-minute round table discussions during the breakfast session, and each one will feature its own industry leaders and topics so attendees can participate in two unique conversations.

• Each roundtable is limited to nine attendees to ensure that you are an active participant in the discussion.

• Breakfast attendees are able to choose their round tables on a first come, first served basis.

SCHEDULE:

8:00 am – Room opens, breakfast buffet served

8:05 am – Introduction by Rolf Agather, FTSE Russell

8:10 am – Start of roundtables session 1

8:30 am – Delegates move to different table. Start of roundtables session 2

8:50 am – Roundtable discussions conclude

Opening Remarks

9:00am - 9:05am
Main Session

Participants

Presenter: John Swolfs - CEO, Inside ETFs

The Non-transparent ETF Revolution & the Inevitable Adoption

9:05am - 9:55am
Main Session

There have been more than a few iterations as the industry looks for the best approach to active ETFs. In this opening panel session, we take an in-depth look at the evolution of active ETFs and highlight why this time is different and what it means for investors.

Participants

Moderator: Allison Fumai - Partner, Dechert LLP

Panelist: Greg Friedman - Head of ETF Management & Strategy, Fidelity Investments

Panelist: Daniel McCabe - CEO, Precidian Investments

Panelist: Terry Norman - Founder, Blue Tractor Group, LLC

Douglas Yones - Head of Exchange Traded Products, NYSE

Morning Keynote: Late Cycle Lament

9:55am - 10:35am
Main Session

James Montier examines classic late cycle behavior and plays foil to market optimists. His research identifies enormous vulnerabilities in the economic system, black swans and predictable surprises, and other concerns.

Participants

Presenter: James Montier - Asset Allocation Team, GMO

Networking Break + Exhibit Hall Content

10:35am - 11:10am
Main Session

So, You Want to Launch an ETF?

Ever wonder what it takes to bring your idea for an ETF to life? Our panel of experts will explore what you need to know before you launch your ETF. We'll provide the working knowledge, industry insights, and highlight the potholes to avoid as we cover off everything from legal, to PR in this 30-minute session.

Participants

Moderator: Michael Cronan - President of ETF Insight, ETF Insight

Panelist: Andrew Chanin - Co-Founder, Procure Holdings

Panelist: Jeffrey Sardinha - Vice President, State Street Global Services

Panelist: Jeremy Senderowicz - Partner, Dechert LLP

Panelist: Julia Stoll - Senior Account Executive, MacMillan Sullivan Communications

SESSIONS

DAY THREE - 28/01/2020

Index Innovation and the Road Ahead: Everything You Need to Know in 10 Questions

11:10am - 11:30am
Main Session

With all the talk about active ETFs coming to market, indexes have been pushed to the back burner. But, what index innovations lie around the corner for investors? What will drive growth over the coming years equities, fixed income or somewhere else and how will you and your clients capture performance via new indexes? Hear from index innovation leads Rolf Agather and Jayni Kosoff gathering first-hand knowledge of where indexes go from here.

Participants

Moderator: Dave Nadig - CIO, ETF Trends, ETF Trends

Panelist: Jayni Kosoff - Managing Director & Head of Fixed Income ETF Sales, FTSE Russell

Panelist: Rolf Agather - Managing Director, North America Research, FTSE Russell

Factors … 2025 … Crossing the $3 Trillion Threshold?

11:30am - 12:30pm
Main Session

Factor adoption has been steady, but cap-weighted strategies continue to gather the lion's share of flows. Our factor experts open up on where equity factors go from here, how to best use smart beta ETFs, and why these strategies just might be the best solution for today's market.

Participants

Moderator: Elisabeth Kashner - Director of ETF Research, FactSet

Panelist: Kamal Bhatia - President & CEO, Principal Funds

Panelist: Craig Lazzara - Managing Director and Global Head of Index Investment Strategy, S&P Dow Jones Indices

Panelist: Ted Lucas - Head of Investment Strategies and Solutions, Hartford Funds

Panelist: Antonio Picca - Senior Portfolio Manager & Head of Factor-Based Investing, Vanguard

Lunch & Networking

12:30pm - 1:40pm
Lunch

Network and connect with peers from across the industry!

Location: The Grand Ballroom

How to Stand Out in a World Full of ETF Models

1:50pm - 2:30pm
Track A - Location: Regency 1

Every ETF model portfolio is built differently and designed to give investors easier access to the global market. But how can you distinguish between them to know which one is right for you? We'll show you how.

Participants

Moderator: Caleb Silver - Editor-in-Chief, Investopedia

Panelist: John Davi - Founder & Chief Investment Officer, Astoria Portfolio Advisors

Panelist: Kim Arthur - Chief Executive Officer & Chief Investment Officer, Main Management LLC

Panelist: Matthew Erickson - Senior Portfolio Manager, Polaris Greystone Financial Group, LLC

Panelist: Tim Clift - Chief Investment Strategist, Envestnet/PMC

Multifactor ETFs Explored

1:50pm - 2:30pm
Track B - Location: Regency 2

There are a million and one approaches to investing in the markets. Doing your due diligence is the real challenge. In this fast-paced session, four multifactor product providers take the stage, each sharing a five-minute deep dive on their approach to multifactor investing, followed by a roundtable of live audience Q&A.

Participants

Moderator: Drew Voros - Editor-in-Chief, ETF.com

Panelist: Aye Soe - Managing Director, Global Head of Product Management, S&P Dow Jones Indices

Panelist: Eric Balchunas - Senior ETF Analyst, Bloomberg Intelligence

Panelist: Hamish Seegopaul - Managing Director, Quantitative and Multi-Asset Solutions,, Qontigo

Panelist: Lukas Smart - Senior Portfolio Manager and VP, Dimensional Fund Advisors LP

Fixed Income in Uncertain Times

1:50pm - 2:30pm
Track C - Location: Regency 3

Bond investing has never been more difficult, as uncertainly carries the day, leaving asset allocators in limbo on where to invest going forward. Hear from our bond experts as they share liquid, low-cost ETFs solutions for navigating tricky markets.

Participants

Moderator: Cinthia Murphy - Managing Editor, ETF.com

Panelist: Elizabeth Marchetti - Investment Director, WST Capital Management

Panelist: Jeremiah Charles - Senior Vice President, First Trust Portfolios L.P.

Panelist: Matt Collins - Head of ETFs, PGIM Investments

Panelist: Nancy Davis - Founder & CIO Quadratic, Quadratic Capital Management LLC

Alpha for 2020: 4 Big Ideas

1:50pm - 2:30pm
Track D - Location: Atlantic 3

Everyone loves alpha, but finding it is the challenge. In this session, four alpha-focused product providers take the stage, each sharing a five-minute deep dive on their approach to alpha generation, followed by a roundtable of live audience Q&A.

Participants

Moderator: Sumit Roy - Analyst, ETF.com

Panelist: Adam Grossman - Global Equity CIO, Riverfront

Panelist: Jay Pelosky - Co Founder & Chief Investment Officer, TPW Investment Management

Panelist: Sandra Testani - Director of Product Management, Alternatives and ETFs, American Century

Panelist: Saumen Chattopadhyay - Senior Vice President, Investment Platform, Carson Group

SESSIONS

DAY THREE - 28/01/2020

How You Really Should Get Paid

1:50pm - 2:30pm
Peer-to-Peer - Location: Atlantic 2

As the industry races to zero, identifying and sharing your value proposition as an advisor has become increasingly difficult. In this session, we explore how advisors can build their unique value proposition and how to be fairly compensated for the services you provide.

Participants

Moderator: Nate Geraci - President, The ETF Store, Inc.

Panelist: Casey Smith - Owner & President, Wiser Wealth Management

Panelist: Joshua Brown - CEO, Ritholtz Wealth Management

Panelist: Nina O'Neal - Partner & Investment Advisor, Archer Investment Management

Direct Indexing Explained - What You Need to Know

1:50pm - 2:30pm
Advisor Accelerator - Location: Atlantic 1

Indexes have long been the benchmarks for gauging the movement and performance of the market, but are we using indexes to their full advantage? In this exciting session, we dive deep into the use and purpose of direct indexing, highlight the nuts and bolts of how it works, and discuss how you can incorporate direct indexing solutions into client portfolios to solve SRI needs, mitigate against single-stock concentration risks, potentially improve tax performance and find new ways to grow your business.

Participants

Moderator: Diana Britton - Managing Editor, WealthManagement.com

Speaker: James Gardiner - Co-Founder & COO, TPW Investment Management

Speaker: Joe Smith - Co-Founder & Chief Investment Officer, Parti Pris Investment Partners

Speaker: Jeffrey Brown - Director – Institutional Portfolio Manager, Parametric

ETFs: a Cure for the Variable Annuity Blues?

2:30pm - 3:10pm
Track A - Location: Regency 1

While insurers use of ETFs in the General Account insurance business is growing quickly (e.g. 401k / 403k), ETFs are gaining traction within Variable Annuities ($100 bn annual sales, $2 trillion AuM) despite recent sluggish sales. Among drivers, product lines become more diverse, consumers demand low-cost products, regulators increase scrutiny on fees transparency, and insurers look for cheap risk mitigating tools for the guarantees embedded into Variable Annuities. We identify key axes to make ETFs an efficient business opportunity to asset managers to distribute into their annuity channel.

Participants

Speaker: Aymeric Kalife - CEO and Founder, iDigital Partner

Dividend & Income: You Need It, We Have It

2:30pm - 3:10pm
Track B - Location: Regency 2

The financial crisis of 2008 created a universe where yields are scarce and needed more than ever. In this fast-paced session, four income-focused product providers take the stage, each sharing a five-minute deep dive on their approach to dividends, followed by a roundtable of live audience Q&A.

Participants

Moderator: Joe Anthony - President, Gregory FCA

Panelist: Joe Kairen - Head of Strategy and Volatility Indices, S&P Dow Jones Indices

Panelist: Paul Nolte - Senior VP, Kingsview Wealth Management

Panelist: Vince Lowry - CEO, Global Beta Advisors

Panelist: Ben Johnson - Director of Global ETF Research, Morningstar

Building a Defensive Portfolio

2:30pm - 3:10pm
Track C - Location: Regency 3

An ounce of prevention goes a long way when it comes to investing. Walking the line between being defensive and riding the 10-year bull market isn't easy. Hear from our experts as they share actionable ideas for weatherproofing your portfolio for the uncertainty ahead.

Participants

Moderator: Jillian DelSignore , Women in ETFs (WE) Board member

Panelist: Eric Biegeleisen - Managing Director, Research, 3EDGE Asset Management

Panelist: Ed Lopez - Head of ETF Product, VanEck

Panelist: Kevin Mahn - President & Chief Investment Officer, Hennion & Walsh Asset Management

Panelist: Manish Khatta - President and Chief Investment Officer, Potomac Fund Management, Inc.

Factor Strategies for the Road Ahead

2:30pm - 3:10pm
Track D - Location: Atlantic 3

There's a growing concern that markets are headed for a meltdown. With more options than ever to try and weatherproof a portfolio, will factor ETFs finally have their day in the sun and deliver on the promise of a smoother ride and better investment outcomes?

Participants

Moderator: Daniil Shapiro - Associate Director, Product Development, CERULLI ASSOCIATES

Panelist: Jeffrey Schwarte - Portfolio Manager, Principal Global Investors

Panelist: Mark Carver - Managing Director & Global Head of Factor Index Products, MSCI

Panelist: Sam Huszczo - Founder, SGH Wealth Management

Panelist: Scott Chronert - Managing Director and Global Head of ETF Research, Citi

Growing Together: The Power Of Collaboration.

2:30pm - 3:10pm
Peer-to-Peer - Location: Atlantic 2

For years advisors were curious how their peers were growing their practices but rarely did they collaborate. Times have changed and we all know that teamwork and discussion are more vital than ever. In this unique session, we share how advisors are working together in real-time to grow, exchange best practices, and become better advisors.

Participants

Panelist: Justin Castelli - CEO & Financial Advisor, RLS Wealth Management

Panelist: Taylor Schulte - Founder & CEO, Define Financial

Tools and Technology: Building a Working Stack

2:30pm - 3:10pm
Advisor Accelerator - Location: Atlantic 1

Understanding and deploying technology correctly could be the difference between growth and closing up shop in the next few years. Hear from tech providers and consultants who are building tools and educating advisors on how to help them save time, make better decisions and ultimately build a better practice

Participants

Moderator: Alex Chalekian - Founder and CEO, Lake Avenue Financial

Panelist: Tyrone Ross Jr. - Financial consultant, 401

Panelist: Sheryl Hickerson - CEO,, Females and Finance, LLC

Panelist: Sean Kruzel - Founder of Portformer, Astrocyte Research

Panelist: Kristen Schmidt - Founder and President, RIA Oasis

8 ETF Nuggets that may be Gold for Your Client

3:10pm - 3:30pm
Track A - Location: Regency 1

Join Rich Powers, head of Vanguard ETF Product Management, and Janel Jackson, head of Vanguard's ETF Capital Markets Team as they offer new insights and updates on the latest developments across the ETF landscape in order to help you get smart, make better decisions and build better outcomes

Participants

Presenter: Janel Jackson - Head of US ETF Capital Markets, Vanguard

Presenter: Richard Powers - Head of ETF Product Management, Vanguard

How Green is Your Cash? The Next Frontier of ESG Investing

3:10pm - 3:30pm
Track B - Location: Regency 2

Sustainable investing is becoming a priority, but there are limited ESG solutions for short-duration investors. We'll discuss a framework for active liquidity management and actionable ideas for investors who seek positive returns alongside the ability to drive positive change.

Participants

Presenter: Jerome Schneider - Head of Short-Term Portfolio Management, PIMCO

What's in a Name? In the Case of Smart Beta, It's Hard to Tell.

3:10pm - 3:30pm
Track C - Location: Regency 3

It's been over 10 years since the GFC, and Smart Beta has changed the way we invest. While factor investing has been proven both academically and empirically to produce excess returns, some investors are asking: how will these strategies perform in the next crisis? Despite similar names, portfolio construction may differ greatly between products – we examine how these nuances can lead to differing reactions to market and economic events.

Participants

Speaker: Sebastian Ceria - Chief Executive Officer,, Qontigo

Reality check: Facts about Factors and other Indexing Issues

3:10pm - 3:30pm
Track D - Location: Atlantic 3

Rolf Agather, Managing Director, Research and Innovation at index provider FTSE Russell looks between the knowns and unknowns in indexing and ETFs, to tackle truths and misconceptions. Take a moment to set the record straight on four of these issues to help clients better understand the fine points on important index performance and risk topics.

Participants

Presenter: Rolf Agather - Managing Director, North America Research, FTSE Russell

ETF Spotlight Talk: Living Life at ZIRP – What it Really Means for Your Clients

3:10pm - 3:30pm
Peer-to-Peer - Location: Atlantic 2

It was not all that long ago that rate looked to be ticking up, but then Trump got involved, fears of slow growth returned and we back to zero. What does this really mean for bond investors, what does it mean for your clients and their financial future? In this session, ZIRP expert David Kotok sits down with Matt Hougan for an inside look at how he is helping clients and positioning portfolios.

Participants

Interviewer: Matt Hougan - Chairman, Inside ETFs

Interviewee: David Kotok - Chairman/CIO, Cumberland Advisors

ETF Spotlight Talk :Advisor as CEO

3:10pm - 3:30pm
Advisor Accelerator - Location: Atlantic 1

Much of advisors' time is occupied with monitoring the market and managing client money, in their Chief Investment Officer or CIO role. Yet, advisors want to spend more of their time engaging in higher value-added activities like planning for clients' future, caring for their loved ones, to be more of a CEO to their clients' life. This talk addresses how advisors can spend less time on their CIO role and more on their CEO role, without sacrificing the quality of managing the money. We dive into how Fidelity looks at the current market environment, pillars to our asset allocation work, use of behavioral finance to invest better, and how you can leverage our resource for your practice via our model portfolios or portfolio consulting service.

Participants

Speaker: Paul Ma - Vice President, Lead Portfolio Strategist, Fidelity Investments

Networking Break + Exhibit Hall Content - Talking Freedom – An Interview with Perth Tolle.

3:30pm - 4:00pm

Talking Freedom – An Interview with Perth Tolle.

New Metrics and Strategies for Emerging Markets & ESG - An Interview

Participants

Interviewer: Perth Tolle - Founder of Life + Liberty Indexes, Life + Liberty Indexes

Speaker: Danielle Rutsky - ETF Capital Markets Specialist, DWS ETF Capital Markets

SESSIONS

DAY THREE - 28/01/2020

The Best New ETF of 2020: The ETF Pundit Super Bowl

4:00pm - 4:40pm
Main Session

This Inside ETFs tradition pits the world's leading ETF pundits against each other with their best new ETF of the year. It's sure to provide you with a few laughs and a few great ideas, with your audience vote determining the winner of the coveted 2020 People's Choice award.

Participants

Referee: John Swolfs - CEO, Inside ETFs

Contestant: Eric Balchunas - Senior ETF Analyst, Bloomberg Intelligence

Contestant: Matt Hougan - Chairman, Inside ETFs

Contestant: Ben Johnson - Director of Global ETF Research, Morningstar

Contestant: Elisabeth Kashner - Director of ETF Research, FactSet

Contestant: Tom Lydon - CO-CEO, ETF Trends & ETF Database, ETF Trends

Contestant: Cinthia Murphy - Managing Editor, ETF.com

Contestant: Dave Nadig - CIO, ETF Trends, ETF Trends

Contestant: Todd Rosenbluth - Sr. Director, ETF & Mutual Fund Research, CFRA

Contestant: Daniel Straus - Vice President, ETFs & Financial Products Research, National Bank of Canada Financial Markets

Reassessing Risk

4:40pm - 5:10pm
Main Session

There have been a variety of episodes of market instability that have involved ETFs. But are ETFS the instigator of such episodes, an active participant, or an innocent bystander? This session will discuss the potential systemic risks posed by ETFs and why they might arise. We also discuss what, if any, regulatory policies are needed to reduce these potential risks, with a focus on both US and outside US regulatory actions.

Participants

Moderator: Annie Massa - Investing Reporter, Bloomberg News

Panelist: Maureen O'Hara - Professor of Finance, The Johnson Graduate School of Management, Cornell University

A Conversation with Derek Jeter

5:10pm - 5:50pm
Main Session

Having spent 20 years in the New York spotlight navigating all the potholes and pitfalls presented to him, Mr. November will take to the stage at Inside ETFs to reveal what drove him to fulfill his childhood dream of being a Yankee, what it was like to play for a legendary owner and die hard fans in baseball and why he took on the challenge of rebuilding the Miami Marlins.

Participants

Speaker: Derek Jeter - Executive, Entrepreneur, Philanthropist, and Former New York Yankees Captain, Miami Marlins

Tuesday Night Celebration

6:00pm - 7:30pm

Join fellow Inside ETFs delegates at our Tuesday night networking reception for one last evening in the lovely Florida weather. Make new connections and continue conversations.

Location: South Palm Court

SCHEDULE
DAY THREE - 28/01/2020

Inside ETFs

January 26 - 29, 2020
Diplomat Beach Resort
Hollywood, Florida

TIME	ADVISOR ACCELERATOR - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 1 - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 2 - LOCATION: REGENCY 2	LUNCH	MAIN SESSION	PEER-TO-PEER - LOCATION: ATLANTIC 2	TRACK A - LOCATION: REGENCY 1	TRACK B - LOCATION: REGENCY 2	TRACK C - LOCATION: REGENCY 3	TRACK D - LOCATION: ATLANTIC 3
6:00AM	**6:30am** - 3rd Annual Inside ETFs Fun-Run	**6:30am** - 3rd Annual Inside ETFs Fun-Run	**6:30am** - 3rd Annual Inside ETFs Fun-Run	**6:30am** - 3rd Annual Inside ETFs Fun-Run	**6:30am** - 3rd Annual Inside ETFs Fun-Run	**6:30am** - 3rd Annual Inside ETFs Fun-Run	**6:30am** - 3rd Annual Inside ETFs Fun-Run	**6:30am** - 3rd Annual Inside ETFs Fun-Run	**6:30am** - 3rd Annual Inside ETFs Fun-Run	**6:30am** - 3rd Annual Inside ETFs Fun-Run
7:00AM										
8:00AM		**8:00am** - Breakfast Workshop: Do You Know What Drives Returns in Your Portfolio	**8:00am** - Breakfast Workshop: Roundtable discussions – Insights from 10 ETF issuers							
9:00AM					**9:00am** - Opening Remarks **9:05am** - The Non-transparent ETF Revolution & the Inevitable Adoption **9:55am** - Morning Keynote: Late Cycle Lament					
10:00AM					**10:35am** - Networking Break + Exhibit Hall Content					

SCHEDULE

DAY THREE - 28/01/2020

Inside ETFs

January 26 - 29, 2020
Diplomat Beach Resort
Hollywood, Florida

TIME	ADVISOR ACCELERATOR - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 1 - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 2 - LOCATION: REGENCY 2	LUNCH	MAIN SESSION	PEER-TO-PEER - LOCATION: ATLANTIC 2	TRACK A - LOCATION: REGENCY 1	TRACK B - LOCATION: REGENCY 2	TRACK C - LOCATION: REGENCY 3	TRACK D - LOCATION: ATLANTIC 3
11:00AM					**11:10am** - Index Innovation and the Road Ahead: Everything You Need to Know in 10 Questions **11:30am** - Factors … 2025 … Crossing the $3 Trillion Threshold?					
12:00PM				**12:30pm** - Lunch & Networking						
1:00PM	**1:50pm** - Direct Indexing Explained - What You Need to Know					**1:50pm** - How You Really Should Get Paid	**1:50pm** - How to Stand Out in a World Full of ETF Models	**1:50pm** - Multifactor ETFs Explored	**1:50pm** - Fixed Income in Uncertain Times	**1:50pm** - Alpha for 2020: 4 Big Ideas
2:00PM	**2:30pm** - Tools and Technology: Building a Working Stack					**2:30pm** - Growing Together: The Power Of Collaboration.	**2:30pm** - ETFs: a Cure for the Variable Annuity Blues?	**2:30pm** - Dividend & Income: You Need It, We Have It	**2:30pm** - Building a Defensive Portfolio	**2:30pm** - Factor Strategies for the Road Ahead

SCHEDULE

DAY THREE - 28/01/2020

Inside ETFs

January 26 - 29, 2020
Diplomat Beach Resort
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TIME	ADVISOR ACCELERATOR - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 1 - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 2 - LOCATION: REGENCY 2	LUNCH	MAIN SESSION	PEER-TO-PEER - LOCATION: ATLANTIC 2	TRACK A - LOCATION: REGENCY 1	TRACK B - LOCATION: REGENCY 2	TRACK C - LOCATION: REGENCY 3	TRACK D - LOCATION: ATLANTIC 3
3:00PM	**3:10pm** - ETF Spotlight Talk :Advisor as CEO **3:30pm** - Networking Break + Exhibit Hall Content - Talking Freedom – An Interview with Perth Tolle.	**3:30pm** - Networking Break + Exhibit Hall Content - Talking Freedom – An Interview with Perth Tolle.	**3:30pm** - Networking Break + Exhibit Hall Content - Talking Freedom – An Interview with Perth Tolle.	**3:30pm** - Networking Break + Exhibit Hall Content - Talking Freedom – An Interview with Perth Tolle.	**3:30pm** - Networking Break + Exhibit Hall Content - Talking Freedom – An Interview with Perth Tolle.	**3:10pm** - ETF Spotlight Talk: Living Life at ZIRP – What it Really Means for Your Clients **3:30pm** - Networking Break + Exhibit Hall Content - Talking Freedom – An Interview with Perth Tolle.	**3:10pm** - 8 ETF Nuggets that may be Gold for Your Client **3:30pm** - Networking Break + Exhibit Hall Content - Talking Freedom – An Interview with Perth Tolle.	**3:10pm** - How Green is Your Cash? The Next Frontier of ESG Investing **3:30pm** - Networking Break + Exhibit Hall Content - Talking Freedom – An Interview with Perth Tolle.	**3:10pm** - What's in a Name? In the Case of Smart Beta, It's Hard to Tell. **3:30pm** - Networking Break + Exhibit Hall Content - Talking Freedom – An Interview with Perth Tolle.	**3:10pm** - Reality check: Facts about Factors and other Indexing Issues **3:30pm** - Networking Break + Exhibit Hall Content - Talking Freedom – An Interview with Perth Tolle.
4:00PM					**4:00pm** - The Best New ETF of 2020: The ETF Pundit Super Bowl **4:40pm** - Reassessing Risk					
5:00PM					**5:10pm** - A Conversation with Derek Jeter					
6:00PM	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration

SESSIONS

DAY FOUR - 29/01/2020

Inside ETFs

January 26 - 29, 2020
Diplomat Beach Resort
Hollywood, Florida

Opening Remarks

9:00am - 9:10am
Inside ETFs' 'Big Ideas' Day

Participants

Speaker: Matt Hougan - Chairman, Inside ETFs

What's Next? Inside the Mind of a Serial Investor

9:10am - 9:50am
Inside ETFs' 'Big Ideas' Day

Ever wonder what it takes to be ahead of the game and spot a good idea before it becomes a great idea? We know Howard Lindzon does, so we invited him to take the Big Ideas stage with Josh Brown to chat about all the latest and greatest when it comes to the advisory market. This future-forward session is a must-attend for any advisor looking to stay ahead of the trends and remain on the cutting edge.

Participants

Interviewer: Joshua Brown - CEO, Ritholtz Wealth Management

Interviewee: Howard Lindzon - Managing Director, Social Leverage

The Return of Crypto

9:50am - 10:30am
Inside ETFs' 'Big Ideas' Day

Market uncertainty has brought cryptocurrency back to the forefront. But major questions remain around use, investment merit, security and more. Hear from leading crypto thinkers as they bring us up to speed on all things crypto, with a focus on when and if we'll see a crypto ETF.

Participants

Moderator: Lara Crigger - Sr. Staff Writter, ETF.com

Panelist: Michael Sonnenshein - Managing Director, Grayscale Investments

Panelist: Matt Hougan - Chairman, Inside ETFs

Who's Afraid of Direct Indexing?

10:30am - 11:00am
Inside ETFs' 'Big Ideas' Day

Matt Hougan and Dave Nadig shocked the Inside ETFs audience in 2019 with their assertion that direct indexing was the next big thing. Brian Langstraat is the CEO of Parametric, a pioneer and leader in the space, with over $100 billion of its $252 billion in total assets under management in direct indexing. In this session he tackles the myths and misperceptions of direct indexing, why it can coexist with ETFs, and how advisors can use custom direct indexing to grow their practice and strengthen their client relationships.

Participants

Presenter: Brian Langstraat - Chief Executive Officer, Parametric

Networking Break

11:00am - 11:20am
Inside ETFs' 'Big Ideas' Day

Five Ways Technology Will Change the Way We Age

11:20am - 11:50am
Inside ETFs' 'Big Ideas' Day

A multitude of apps, sites, and devices can make it easier for clients to work (if they want to), stay healthy, live in the home of their choice, and remain socially connected as they age. Hear John Diehl share the new technologies that are transforming retirement.

Participants

Presenter: John Diehl - SVP, Strategic Markets, Hartford Funds

Impact of Giving - Why We Should Be Doing More

11:50am - 12:20pm
Inside ETFs' 'Big Ideas' Day

It is no secret that Main street does not love Wall street and it is not hard to see why. So what can we as wealth managers and representatives of the industry do change the negative perception? In this fast-moving talk Inside ETFs Ambassador Tyrone Ross Jr takes the big ideas stage to share the impact of giving, how we can do more and why it matters way more than you think.

Participants

Speaker: Tyrone Ross Jr. - Financial consultant, 401

Closing Keynote: What to Do When a Strategy Performs Poorly

12:20pm - 1:00pm
Inside ETFs' 'Big Ideas' Day

In what's become a time-honored tradition at Inside ETFs, we welcome back investment expert Larry Swedroe for his annual keynote talk.

Participants

Presenter: Larry Swedroe - Director of Research, Buckingham Strategic Wealth

Conference Concludes

1:00pm - 1:05pm
Inside ETFs' 'Big Ideas' Day

SCHEDULE

DAY FOUR - 29/01/2020

Inside ETFs

January 26 - 29, 2020
Diplomat Beach Resort
Hollywood, Florida

TIME	INSIDE ETFS' 'BIG IDEAS' DAY
9:00AM	**9:00am** - Opening Remarks **9:10am** - What's Next? Inside the Mind of a Serial Investor **9:50am** - The Return of Crypto
10:00AM	**10:30am** - Who's Afraid of Direct Indexing?
11:00AM	**11:00am** - Networking Break **11:20am** - Five Ways Technology Will Change the Way We Age **11:50am** - Impact of Giving - Why We Should Be Doing More
12:00PM	**12:20pm** - Closing Keynote: What to Do When a Strategy Performs Poorly
1:00PM	**1:00pm** - Conference Concludes