SESSIONS

2023 AGENDA COMING SOON - SEE WEALTH MANAGEMENT EDGE 2022 DAY 1 BELOW - 31/05/2022

WealthManagement EDGE

May 21 - 24, 2023
The Diplomat Beach Resort
Hollywood, Florida

Registration Opens

1:15pm - 2:15pm

Chair's Remarks

2:15pm - 2:20pm
InsideETFs U Workshop 1.0

Participants

Robert Isbitts - Co-Founder and Chief Investment Strategist, Sungarden Investment Publishing LLC

Chair's Remarks

2:15pm - 2:20pm
InsideETFs Workshop 3.0

Participants

Cullen Roche - Founder and CIO, Discipline Funds

Chair's Remarks

2:15pm - 2:20pm
WealthStack Workshop 2.0

Participants

Neil Turner - CEO and Co-Founder, NewEdge Advisors

The Ultimate Guide on the Fundamentals of ETFs

2:20pm - 3:00pm
InsideETFs U Workshop 1.0

How ETFs really work, where are the true risks and opportunities and what makes a great ETF.

-How the creation/redemption process makes ETFs more liquid and tax efficient than other fund structures.

-Understanding the way ETFs price their underlying assets and why that can create unknown risks and/or efficiencies.

Participants

Moderator: Todd Rosenbluth - Head of Research, VettaFi

Panelist: Jillian DelSignore - Head of Advisor Sales & ETFs, FLX Networks

Panelist: Adam Shoffner - Director and Fund Chief Compliance Officer, Foreside

Mo Sparks - Director, Exchange Traded Products, New York Stock Exchange

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Factor Based Investing in the New Inflationary Economy: A current look at the Quantitative Factors in ETFs to consider investing in TODAY

2:20pm - 3:00pm
InsideETFs Workshop 3.0

Call it factor investing, smart beta or financial science: Factor-based investing has been around for decades. And while it's grown over time, so have the questions around it. What are the smartest factors to use? How are they shifting? (And should they be?) How should you be implementing these strategies for clients? We'll talk to both client-facing advisors and investment strategists about the latest thinking on factor-based strategies.

Participants

Moderator: Stacie Giddings - Head of Advisor Success, Perigon Wealth Management

Panelist: Sam Huszczo, CFP®, CFA® - Founder, SGH Wealth Management

Panelist: Robert Bush - Senior Research Analyst Thought Leadership, DWS Research Institute

Panelist: Crystal McClenthen, CFA - Head Of Product Strategy, Funds And Managed Accounts, FlexShares Exchange-Traded Funds Group

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Artificial Intelligence – Bringing the Sexy Back to the Back Office

2:20pm - 3:00pm
WealthStack Workshop 2.0

AI and its corollary technologies such as Machine Learning (ML), Natural Language Processing (NLP) and Robotic Process Automation (RPA) are ready for prime time in wealth management, however the most promising use cases currently reside in the back office of advisory firms, not necessarily in the front and can dramatically impact an advisory firms' operations, compliance and administrative workflows – all of which are essential to improving service in a highly competitive service profession.

Because workflows in wealth management operations are repetitive, data-based and labor intensive, the back-office is a great candidate for AI and its cousins RPA, ML and NLP to drive workflow automation.

Participants

Moderator: Tim Welsh - President, CEO & Founder, Nexus Strategy LLC

Amy Flourry - Director of Operations, Rehmann Financial

Vib Arya - Chief Operating Officer, Shufro Rose

Everything You Need to Know About Active ETFs

3:00pm - 3:40pm
InsideETFs U Workshop 1.0

ETFs are just indexes, right? Wrong! But that's what so much of the public thinks. If you are in the ETF industry, on the client advisory, product creation or distribution side, you still may have been operating in the traditional world of ETFs. Thanks to industry innovation, active ETFs are now real...and they can be spectacular! This session will help you understand them better. We'll cover:

-What you should know before retail investors do

-The 5 levels of ETFs and why that matters

-How to research and evaluate active ETFs

-The good, bad and ugly of active ETFs

-What the future holds for ETFs, active and otherwise.

Participants

Moderator: Robert Isbitts - Co-Founder and Chief Investment Strategist, Sungarden Investment Publishing LLC

Panelist: Rafia Hasan - Chief Investment Officer, Wipfli Financial Advisors

Panelist: Matt Lewis - VP, Head of ETF Implementation & Capital Markets, American Century Investments

Panelist: Steve Cook - Managing Director, ETFs, Harbor Capital Advisors, Inc.

Digital Assets Understood

3:00pm - 3:40pm
InsideETFs Workshop 3.0

How should digital assets be used in clients portfolio construction? And how many digital assets should investors have? These questions and more will be debated and discussed amongst our crypto experts.

Participants

Moderator: Adam Blumberg, CFP - Co-Founder and Lead Curriculum Developer - Certified Digital Asset Advisor, Interaxis

Panelist: Roxanna Islam CFA - Associate Director of Research, VettaFi

Panelist: Jan Van Eck - Chief Executive Officer, VanEck

Panelist: Jackson Wood - Portfolio Manager, Freedom Day Solutions

Technology Drivers of Next Gen Investing

3:00pm - 3:40pm
WealthStack Workshop 2.0

A panel to discuss what next gen investors are looking for when it comes to technology offerings and where applicable, "investment offerings". Insights into the impact of technology that is driving this generations financial decisioning and preferences.

Participants

Moderator: Davis Janowski - Senior Technology Editor, WealthManagement.com

Panelist: Carin Stimolo - VP, Client Experience, Fidelity ESG ProSM

Panelist: Zach Conway - Founder & CEO, Seeds Investor

Panelist: Eric Hewitt - CFA Chief Investment Officer, SS&C ALPS Advisors

Gamechangers: The Rise of ESG and Socially Responsible Investing

3:00pm - 4:20pm
InsideETFs Think Tank

Participants

Host: Eric Balchunas - Senior ETF Analyst, Bloomberg

The Advisory Firm of the Future Think Tank

3:00pm - 4:20pm
RIA Edge Think Tank

Participants

Host: Mark Bruno - Managing Director, Wealth Management, Informa Connect

Crypto, NFTs and the Metaverse for Dummies

3:40pm - 4:20pm
InsideETFs U Workshop 1.0

Industry experts discuss the tools financial advisors need to best understand how bitcoin, ethereum, and other digital assets can successfully impact their clients' portfolios.

Participants

Moderator: Toby Bochan - Managing Editor, CoinDesk

Panelist: Caitlin Cook - Head of Community and VP of Operations, Onramp Academy

Panelist: Bruno Sousa - Head of Global Expansion and Interim Head of U.S., Hashdex

Are Actively Managed ETFs Here to Stay?

3:40pm - 4:20pm
InsideETFs Workshop 3.0

The active vs passive debate has turned into a gray area in recent years as costs have come down and the distinction has become less meaningful. Active ETFs can in fact be very passive. This is more legal jargon than an accurate description.

Some topics open to debate in this interactive session are:

-Active ETFs will grow in leaps and bounds in the coming years as active mutual funds convert to ETFs.

-The ETF structure is a far superior structure to mutual funds which explains the coming/continued growth.

-The tax efficiency of ETFs is a benefit to active ETFs over passive ETFs.

Participants

Moderator: Cullen Roche - Founder and CIO, Discipline Funds

Panelist: Dodd Kittsley - National Director, Davis Advisors

Panelist: Ryan Issakainen - Senior Vice President and Exchange-Traded Fund Strategist, First Trust

Panelist: Cameron Dawson, CFA - Chief Investment Officer, NewEdge Wealth

Breaking Down the Barriers to Make Digital Assets Accessible

3:40pm - 4:20pm
WealthStack Workshop 2.0

Advisors don't entirely understand what crypto is and why you can't ignore this new asset class. Crypto thought leaders explain how to start the conversation and educate your clients–including responding to common objections.

Participants

Moderator: Sean Allocca - Editor in Chief, ETF.com

Panelist: Matt McCall - Lead Analyst, Stansberry Research

Panelist: Teddy Fusaro - President, Bitwise

Event Welcome and Visionary: Untangling the Uncertain: Understanding 2022's Global Economic State and Investment Risks

4:30pm - 5:00pm

Participants

Speaker: Nouriel Roubini - Professor of Economics New York University's Stern School of Business and CEO, Roubini Macro Associates, LLC

Facilitator: Marguerita Cheng, CFP - CEO, Blue Ocean Global Wealth

EDGE Visionary - What Clients Want: Bringing Together Technology With Human Touch To Improve Client Satisfaction

5:00pm - 5:30pm

Edge Visionary Fireside Chat: What Clients Want: Bringing Together Technology With Human Touch To Improve Client Satisfaction

Here's how Goldman Sachs has embraced the changes brought by the pandemic, connecting digitization with human interaction to strengthen client relationships with advisors and grow the business.

Participants

Joe Duran - Head of Goldman Sachs Personal Financial Management Group, Goldman Sachs

Mark Bruno - Managing Director, Wealth Management, Informa Connect

Welcome Reception in the Hotel Lobby - Sponsored by S&P Dow Jones Indices LLC

5:30pm - 7:00pm

SCHEDULE

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1:00PM	**1:15pm** - Registration Opens	**1:15pm** - Registration Opens	**1:15pm** - Registration Opens	**1:15pm** - Registration Opens	**1:15pm** - Registration Opens
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3:00PM	**3:00pm** - Gamechangers: The Rise of ESG and Socially Responsible Investing	**3:00pm** - Everything You Need to Know About Active ETFs **3:40pm** - Crypto, NFTs and the Metaverse for Dummies	**3:00pm** - Digital Assets Understood **3:40pm** - Are Actively Managed ETFs Here to Stay?	**3:00pm** - The Advisory Firm of the Future Think Tank	**3:00pm** - Technology Drivers of Next Gen Investing **3:40pm** - Breaking Down the Barriers to Make Digital Assets Accessible
4:00PM	**4:30pm** - Event Welcome and Visionary: Untangling the Uncertain: Understanding 2022’s Global Economic State and Investment Risks	**4:30pm** - Event Welcome and Visionary: Untangling the Uncertain: Understanding 2022’s Global Economic State and Investment Risks	**4:30pm** - Event Welcome and Visionary: Untangling the Uncertain: Understanding 2022’s Global Economic State and Investment Risks	**4:30pm** - Event Welcome and Visionary: Untangling the Uncertain: Understanding 2022’s Global Economic State and Investment Risks	**4:30pm** - Event Welcome and Visionary: Untangling the Uncertain: Understanding 2022’s Global Economic State and Investment Risks
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Registration and Breakfast Expo Hall

8:00am - 9:00am
Networking

Women in ETFs Breakfast: Entrepreneurial Spirit Within ETFs

8:00am - 8:50am
Women in ETFs Breakfast

Participants

Opening Remarks: Kara Pagliuca - Global Relationship Manager, S&P Global

Moderator: Emma Friend - Head of Marketing, Capital Group ETFs

Speaker: Lori Tiernan - Chief Strategy Officer, Valkyrie Investments

Speaker: Kelsey Mowrey - President, Motley Fool Asset Management

Speaker: Perth Tolle - Founder, Life + Liberty Indexes

If Hybrid Advice Is The Answer, Why Aren't We There Yet?

8:00am - 9:00am
WealthStack

Description: It's clear that hybrid advice – the flexible, harmonic mix of digital and human financial advice – is how advisors will capture a greater share of the wealth management opportunity. We know advisors want technology and support that gives them more time to spend on the high-value, client-facing activities that will help them gain that share. But haven't we known this for a while? So, why aren't we there yet? Our panel of experts will share their answers including pain points, lessons learned and actionable steps your firm can take today to build out your own future-proof hybrid advice platform.

Participants

Nick Eatock - CEO, intelliflo

William Trout - Director of Wealth Management, Javelin Strategy & Research

Lisa Jacobs - Director, Client Services and Relationship Management, RedBlack

Town Hall on the Leading EDGE Stage - 8:15-8:45

8:15am - 8:45am
Leading Edge Stage

Nouriel Roubini, Professor of Economics New York University's Stern School of Business

and CEO, Roubini Macro Associates, LLC

Participants

Nouriel Roubini - Professor of Economics New York University's Stern School of Business and CEO, Roubini Macro Associates, LLC

Chairs Remarks

9:00am - 9:05am

Participants

Mark Bruno - Managing Director, Wealth Management, Informa Connect

EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset

9:05am - 9:25am

Participants

David Armstrong - Editor-in-chief and Executive Director of Content, WealthManagement.com

Speaker: Reed Colley - CEO, Summit

EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples

9:25am - 9:45am

Participants

Professor Robert Shiller - American economist, best-selling author and Sterling Professor of Economics, Professor of Finance, and Fellow at the International Center for Finance, Yale University

Jeffrey Sherman - Deputy Chief Investment Officer, DoubleLine Capital

The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice

9:45am - 10:25am

Developments in FinTech and WealthTech are presenting financial advisors with more options and opportunities than ever before to build efficient – yet highly customized – portfolios and financial plans for their clients. At the same time, the RIA channel has significantly accelerated its growth and influence, and in the process, is re-shaping the delivery of investments and financial solutions. As the RIA channel continues to grow faster than any other segment in the wealth management industry, and investment management and WealthTech continue to converge, what does the future hold? This panel of industry Visionaries will offer their perspectives on the future of advice and the advisor-client dynamic.

Participants

Moderator: Diana Britton - Managing Editor, WealthManagement.com

Panelist: Heather Kelly - SVP, Head of Advisory & Strategic Accounts, Allianz Life

Panelist: Eric Clarke - CEO, Orion Advisor Solutions

Panelist: Vinay Nair - Founder and CEO, TIFIN

Panelist: Robert Pettman - EVP, Wealth Management Solutions, LPL Financial

Morning Networking and Refreshment Break in Expo Hall

10:25am - 10:55am
Networking

Innovation Demonstrations

10:25am - 10:55am
Leading Edge Stage

Innovation Demonstrations

10:25-10:35 Chris Quandt, Success Enablement Manager, Riskalyze

10:35-10:45 Joel Hurst, Senior Vice President of Business Development, Orion Advisor Technology - Adoption of the Client Experience

10:45-10:55 Joe Torturo, Territory Manager, Laserfiche

10:55-11:15 Fireside Chat: Akshay Singh is the President and CEO, Indyfin and Tim Welsh, President, CEO and Founder, Nexus Strategy, LLC

Participants

Chris Quandt - Success Enablement Manager, Riskalyze

Joel Hurst - Senior Vice President of Business Development, Orion Advisor Technology

Joe Torturo - Territory Manager, Laserfiche

Tim Welsh - President, CEO & Founder, Nexus Strategy LLC

Akshay Singh - President and CEO, Indyfin

Chairs Remarks

10:55am - 11:00am
InsideETFs

Participants

Ron Redell - President, DoubleLine Capital

Chairs Remarks

10:55am - 11:00am
RIA Edge

Participants

Mark Bruno - Managing Director, Wealth Management, Informa Connect

Chairs Remarks

10:55am - 11:00am
WealthStack

Participants

Molly Weiss - Head of Product, Envestnet

InsideETFs Visionary: Russell Indexes – Indexing into the future

11:00am - 11:30am
InsideETFs

Can an index be a visionary? We think the importance of indexes to ETFs might justify a yes, but do you? Catherine Yoshimoto, Director of Product Management for the Russell US Indexes, will make the case, talking about why they were visionary when they were developed, and more importantly, focus on the innovation they spark today.

- Groundbreaking methodology
- Change readiness – IPO inclusion
- Index innovation

Participants

Catherine Yoshimoto - Director, Product Management, FTSE Russell

Driving the Next Generation of RIA Growth – How Technology, M&A and New Perspectives Will Power the Future of the RIA Channel

11:00am - 11:30am
RIA Edge

Driving the Next Generation of RIA Growth – How Technology, M&A and New Perspectives Will Power the Future of the RIA Channel

The RIA channel has experienced incredible growth in recent years – but this is just the beginning of the growth story. Technology, mergers & acquisition and new entrants into the RIA custody world are presenting RIAs with more options and opportunities than ever before. On this panel, RIA industry thought leaders will discuss how these drivers will align to fuel the next wave of growth in the RIA channel – and highlight where there are specific opportunities to for RIAs to take their businesses to the next level.

Participants

Moderator: Mark Bruno - Managing Director, Wealth Management, Informa Connect

Speaker: Ray Adams - Division Director, RIA & Custody Services (RCS), Raymond James

Speaker: Steve Earner - Head of RIA Platform, LPL Financial

Speaker: Richard Lofgren - MD, Head of RIA Sales Central Region, Goldman Sachs

WealthStack Visionary: The Embedded Wealth Stack and the Opportunities Embedded Finance Brings to Wealth Management

11:00am - 11:30am
WealthStack

Imagine being able to save for your goals right where you shop. For example, think about how you currently shop for a house or car. Yes, financing options are available, but what about the option to save or invest, as well? Envision returning an item to Amazon and seeing a question, “Do you want your refund credited back to your credit card, or do you want it deposited into your investment account?” Opportunities like that make an impact and experiences like this are coming – soon.

In this session, Dani Fava, Head of Strategic Development for Envestnet takes a deeper dive in to this new category in financial services – Embedded Finance. Throughout her talk, Dani explains what embedded finance is, why it’s important and how it’s the next big disruption.

Participants

Keynote Speaker: Dani Fava - Head of Strategic Development, Envestnet

Accelerating Diversity, Equity & Inclusion in the Wealth, Asset Management and WealthTech Industries Think Tank (11.30 - 1.30)

11:25am - 12:10pm
EDGE

Room 307

Participants

Host: Suzanne Siracuse - Founder and CEO, Suzanne Siracuse Consulting, LLC

The Truth About ESGs

11:30am - 12:10pm
InsideETFs

Investors are looking to invest in companies which have a positive impact on society or the environment. As younger investors are participating in investing, they are more inclined to invest in ESG companies. This panel will cover the issues around having a true ESG investment strategy, such as:

- Greenwashing
- Active Bets
- Lifestyle vs. Investments
- Subjectivity of ESG Indices
- Voting Power vs. Investment

Participants

Moderator: Eric Balchunas - Senior ETF Analyst, Bloomberg

Panelist: Jonathan Bauman CFA - Vice President, Senior Client Portfolio Manager, American Century Investments

Panelist: Hernando Cortina - Head of Index Strategy, ISS ESG

Panelist: Reid Steadman - Managing Director, Global Head of ESG & Innovation, S&P Dow Jones Indices

RIA CEO All Star Panel

11:30am - 12:10pm
RIA Edge

Hear insights and best practices from leaders at top RIA firms discuss and exchange ideas on how they have established their brands and discovered opportunities for organic and inorganic growth.

Participants

Moderator: Lisa Crafford - Director, Head of Business Consulting, BNY Mellon | Pershing

Panelist: Heather Fortner - CEO, SignatureFD

Panelist: Shannon Eusey - CEO, Beacon Pointe Advisors

Panelist: Kay Lynn Mayhue - President, Merit Financial Advisors

Where are VCs and PEs Investing in the Next Wave of WealthTech and InvestTech

11:30am - 12:10pm
WealthStack

Whether you are a VC/PE wealthtech investor, a wealthtech raising capital now or in the future, or a wealth or investment manager assessing what's next in technology, understanding where and why VCs and PEs are investing and how they develop their theses is incredibly valuable. We will hear from some of the leading investors in the space -- from VC firms making pre-seed investments up to PE firms leading late rounds through to exits -- and get a glimpse into the crystal ball as they share what they view as disruptive and the characteristics they look for in a company they choose to invest in.

Participants

Moderator: Gavin Spitzner - President, Wealth Consulting Partners

Panelist: Lori Hardwick - Board Director, Genstar Capital, Cetera, Orion & Vestwell

Panelist: Abby Miller Levy - Co-Founder & Managing Partner, Primetime Partners

Lunch in Expo Hall

12:10pm - 1:05pm
Networking

Accelerating Diversity, Equity & Inclusion in the Wealth, Asset Management and WealthTech Industries (11.30 - 1.30)

12:10pm - 12:15pm
Wealth Management EDGE Think Tank

Participants

Host: Suzanne Siracuse - Founder and CEO, Suzanne Siracuse Consulting, LLC

Innovation Demonstrations

12:10pm - 12:15pm
Leading Edge Stage

12:15-12:25 Diana Cabrices is Vice President of Enterprise Development, Snappy Kracken

12:25-12:35 George Tamar, Head of Sales, Advisor Engine

12:35-12:45 Taylor Jobs, Founder, Harvest

12:45-12:55 Sohail Dadani, Director, Solution Engineering, MuleSoft , Patrick Ikhifa, Strategic CA, MuleSoft

12:55-1:05 Patrick Reed CEO, YourStake.org

1:05-1:15 Forecasting ETF Performance - Laurence Black, Founder, The Index Standard

Participants

Diana Cabrices - Vice President of Enterprise Development, Snappy Kraken

George Tamer - Head of Sales, Advisor Engine

Taylor Jobe - Founder + Options Evangelist, Harvest – Options Tools for Financial Advisors

Patrick Ikhifa - Strategic CA, Mulesoft

Sohail Dadani - Director, Solution Engineering, Mulesoft

Patrick Reed - Co-Founder and CEO, YourStake.org

Laurence Black - Founder, The Index Standard

Invesco QQQ Lunch session

12:10pm - 12:15pm
InsideETFs

A Conversation with Invesco QQQ

Longtime ETF pioneer Invesco QQQ ETF and global asset management leader Invesco takes the stage to share their insights on the current state of equity markets, quantifying innovation and how you can position client portfolios for the road ahead.

Participants

Ryan McCormack - Senior Factor & Core Equity Strategist, Invesco QQQ

Chair's Welcome

1:05pm - 1:10pm
InsideETFs Track C

Participants

Will Benenson - VP, Business Development, LPL Financial

Stirling Heath - VP, Business Development, LPL Financial

Chair's Welcome

1:05pm - 1:10pm
InsideETFs Track B

Participants

Cameron Dawson, CFA - Chief Investment Officer, NewEdge Wealth

Chair's Welcome

1:05pm - 1:10pm
InsideETFs Track A

Participants

Dodd Kittsley - National Director, Davis Advisors

Chair's Welcome

1:05pm - 1:10pm
RIA Edge Workshop

Participants

Graham Thomas - Director, Strategic Partnerships, Wealth Management, Informa Connect

Chair's Welcome

1:05pm - 1:10pm
WealthStack

Participants

Nicholas Dodds - Director, Wealth Solutions, Envestnet

Do Alternative Investment Strategies Improve Investor Outcomes?

1:10pm - 1:50pm
InsideETFs Track C

As investment products proliferate and access continues to become more democratized, what are the expectations of the investor as they look beyond the traditional 60/40 model? Do they understand the opportunities of diversification and are those expectations aligned with capital markets that are flashing higher volatility and the potential for sharper drawdowns? This panel will discuss the fit and purpose of alternative investments and what this means from a portfolio construction and implementation point of view.

Participants

Moderator: Bill Kelly - CEO, CAIA

Panelist: Eric Woo CFA - Co-founder, Revere

Panelist: Katherine Taylor - Managing Director, First Eagle Investment Management

SESSIONS

2023 AGENDA COMING SOON - SEE WEALTH MANAGEMENT EDGE 2022 DAY 2 BELOW - 01/06/2022

How to Create Value Through ESG Investing

1:10pm - 1:50pm
InsideETFs Track B

How to Create Value Through ESG Investing

How can your firm use ESG data to drive economic value for your clients? Leading experts discuss how the synergy created between sustainability and your business objectives can improve business strategies.

Participants

Moderator: Deborah Fuhr - Managing Partner & Founder, ETFGI, Partner & founder ETF TV

Panelist: Yasmin Dahya Bilger - Head of ETFs, Engine No.1

Panelist: Jane Edmondson - Co-Founder and CEO, EQM Indexes

Allocation Nation: Winning Strategies for Any Portfolio

1:10pm - 1:50pm
InsideETFs Track A

Financial markets are constantly changing, and elevated uncertainty in today's world as lead to increased volatility for capital markets. But no matter what your client's objectives are, the proper asset allocation and investment strategies can increase a portfolio's return while limiting total risk. Join our panel of experts as they discuss all-weather portfolio strategies that can work for any portfolio allocation.

Participants

Moderator: Robert Schein - Managing Director, Partner & CIO,, Blanke Schein Wealth Management

Panelist: Shana Sissel - Director of Investments, Cope Corrales

Panelist: Tim Holland - Chief Investment Officer, Orion Advisor Solutions

Valuation & M&A Workshop

1:10pm - 3:10pm
RIA Edge Workshop

Join us as we take a deep dive into the drivers of RIA M&A and valuations. Experts discuss building a framework for how to strategically use M&A as a growth tool while understanding the true drivers of valuation – and ultimately, what you can do to increase the value of your business.

1:15-1:45

Presenter: Daniel Seivert, CEO and Founder ECHELON Partners

1:45-2:15

Jim Dickson, Founder and CEO, Sanctuary Wealth

2:15-3:15

Panel

Moderator: Mark Bruno, Managing Director, US Global Wealth, Informa Connect

Panelist: Allen Darby, CEO, Alaris Acquisitions

Jeff Haller, MD, Financial Institutions Group, Investment Banking Division, Goldman Sachs

Craig J. Reid, CFP® CLU® CPFA, President, MMA Securities LLC

Participants

Lead Presenter: Dan Seivert - CEO and Founder, ECHELON Partners

Panelist: Allen Darby - CEO, Alaris Acquisitions, LLC

Workshop Presentation 2: Jim Dickson - Founder and CEO, Sanctuary Wealth

Moderator: Mark Bruno - Managing Director, Wealth Management, Informa Connect

Panelist: Jeff Haller - MD, Financial Institutions Group, Investment Banking Division, Goldman Sachs

Panelist: Craig Reid - President, MMA Securities LLC

The Value of Advice: Articulating and Demonstrating Your True "Alpha" to Clients and Prospects

1:10pm - 1:50pm
WealthStack

This session will focus on the following core topics:

- Aside from pure performance and returns, what are some of the most effective ways wealth managers can illustrate the importance – and value – of their services to clients and prospects? Specifically, panelists will discuss how they have aligned with goals and outcomes to improve client retention and relationships
- Presenters will also discuss the role technology can play as a differentiator – and ultimately a creator of alpha
- Panel will address the wealth management services, outcomes or solutions that create the most value for investors

Participants

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

Panelist: Ron Bullis - CEO, Lifeworks Advisors

Panelist: Rianka Dorsainvil - Co-Founder and Co-CEO, 2050 Wealth Partners

Accessing Emerging Investment Opportunities Through Thematics

1:50pm - 2:30pm
InsideETFs Track C

Investors are looking beyond simple sector funds or growth strategies to capture the investment return potential in disruptive forces like digital payments, remote working, electric vehicles and medical breakthroughs. But not all tech breakthroughs or trends make good investing strategies, and some themes may be dominated by companies already in investor portfolios.

Among the questions we will explore:

-What are the elements that turn a collection of interesting companies into an investable theme?

-How does technology and fundamental analysis find the best companies that match the theme?

Why do products that seem to cover the same theme can perform very differently?

-How can an advisor integrate thematic ETFs into a broader portfolio strategy?

Participants

Moderator: Jackie Noblett - Senior Reporter, Ignites, Producer, ETF Insider, Financial Advisor IQ

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

Panelist: Roberto Lazzarotto - CEO, Yewno

Panelist: Jason Tauber, CFA - Managing Director, Neuberger Berman

Uncovering Value with Actively Managed Fixed Income

1:50pm - 2:30pm
InsideETFs Track B

Participants

Moderator: Bart Farinholt - Director of Corporate Strategy, Riverfront Investment Group

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

Panelist: Samuel Lau - Fixed Income Asset Allocation Specialist and Portfolio Manager, DoubleLine Capital

Panelist: James McNerny - Managing Director, Portfolio Manager. Global Liquidity Business, JP Morgan Asset Management

Strategies to Attract and Retain Younger Investors

1:50pm - 2:30pm
InsideETFs Track A

The challenge for advisors is clients’ children may not stay when they assume responsibility for the finances. The reason often shared is they don’t know their parent’s advisor. A Cerulli report shared over the next two decades, $84.4 trillion in wealth is expected to pass mostly (63%) from boomer hands, with $11.9 trillion of it going to charity. Now is the time to connect and work with younger investors.

The strategies include:

- Align your team with younger investors
- Deliver targeted communications and social media
- Host an Advisory groups
- Deliver information in new formats

Participants

Moderator: Maureen Wilke - President, Wilke and Associates, Inc.

Brett Orvieto - Managing Director, Dakota Wealth Management, LLC

Ben Cruikshank - Head of Flourish, Flourish

Democratization of Access to the Investment Experience: How Technology is enabling investors to access new markets

1:50pm - 2:30pm
WealthStack

Participants

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

Panelist: Joseph Raieta - Partner, Managing Director, and Head of Investment Solutions, Snowden Lane Partners

Panelist: Shane Williams - Chief Technology Officer, CAIS

Panelist: Madalyn Armijo - Director of Account Management, Vise

Are TIPS a Good Inflation Hedge?

2:30pm - 3:10pm
InsideETFs Track C

Where are we in the inflation cycle? Have we reached peak PPI? Four inflation experts will debate and discuss how portfolios should be positioned for the high inflation times we are currently living in. They will discuss whether TIPS are an appropriate inflation hedge and whether there are other products and solutions that might be more conducive than TIPS.

Participants

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

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

Panelist: Michael Contopoulos - Director of Fixed Income, Richard Bernstein Advisors

Regulatory Updates - ETF Changes and Challenges

2:30pm - 3:10pm
InsideETFs Track B

With a deep background in ETF development and regulatory issues, the panel’s goal is to help advisors to feel updated and informed on the most relevant regulatory changes affecting ETFs to help improve their client relationships and firms’ success. Discussion will include the new ETF marketing rule, transparency in ETFs, conversion from mutual funds to ETFs, the influx of asset managers wanting to get into ETFs and the impact of large asset managers launching actively managed ETFs with transparency. There will be ample time for audience questions on these and other related ETF issues.

Participants

Moderator: Steve Skancke, PhD - Chief Economic Advisor, Keel Point

Panelist: Joshua Weinberg - Senior Special Counsel, SEC

Panelist: Adam Teufel - Partner, Dechert

ETFs vs. Direct Indexing: What Does the Future Hold?

2:30pm - 3:10pm
InsideETFs Track A

ETFs vs. Direct Indexing: What Does the Future Hold?

Direct Indexing has exploded in popularity and more financial advisors are incorporating it into client portfolios than ever before. Increased adoption, advances in technology and appreciation for the tax benefits of Direct Indexing will likely continue to accelerate its rapid growth. How will this impact the advisors' perception and use of ETFs going forward? Our expert panelists will address the pros and cons of each when constructing portfolios for your clients and offer in-depth analysis on their most appropriate applications.

Participants

Moderator: Michael Rose - Managing Partner, Rose Capital Advisors

Panelist: Rob Reina - Americas Head of Investable Product Strategy, Qontigo

Panelist: Avita Sukhram - Director, Product Management, FTSE Russell

Panelist: Jonathan Hudacko - Principal, Personalized Indexing Financial Advisor Services, Vanguard

Going Global: Is the RIA Business Model the Future of Global Wealth Management?

2:30pm - 3:10pm
WealthStack

While M&A activity levels have accelerated at incredible rates in recent years, only a handful of companies have pursued international deals and expansion opportunities. This session will highlight how the industry's true visionaries view opportunities in the U.S. RIA market – as well as abroad – and how they are looking to build wealth management and technology platforms capable of global scale and success.

Participants

Moderator: Lorie Konish - Personal Finance Reporter, CNBC

Panelist: Matt Regan - President, WealthCare

Panelist: Jim Dickson - Founder and CEO, Sanctuary Wealth

Panelist: Carolyn Armitage - Head of Thrivent Advisor Network (TAN), Thrivent Advisor Network

Panelist: Bob Oros - CEO, Hightower

Afternoon Networking and Refreshment Break in Expo Hall – Ice Cream Social Sponsored by: American Century Services LLC

3:10pm - 3:35pm
Networking

Innovation Demonstrations

3:10pm - 3:35pm
Leading Edge Stage

3:15-3:25 Adam Green, Chief Executive Office, YieldX

3:25-3:35 Chris Field, Chief Growth Officer, Holistiplan

3:35-3:45 Peter Nolan, Director of Strategic Accounts, Pontera

Participants

Adam Green - Chief Executive Officer, YieldX

Chris Field - Chief Growth Officer, Holistiplan

Peter Nolan - Director of Strategic Accounts, Pontera

Chair

3:35pm - 3:40pm
InsideETFs

Participants

Ron Redell - President, DoubleLine Capital

Chair

3:35pm - 3:40pm
RIA Edge Workshop

Participants

Graham Thomas - Director, Strategic Partnerships, Wealth Management, Informa Connect

Chair

3:35pm - 3:40pm
WealthStack

Participants

Nicholas Dodds - Director, Wealth Solutions, Envestnet

Vital Signs: 4 Key Investment Factors For Today's Professional Investor

3:40pm - 4:20pm
InsideETFs

1. Algorithmic investing + Indexing = a lot of "valuation-insensitive" money in the stock market. How do you adapt?

2. Bond investing in a rate-tightening cycle: new era or just a phase?

3. How to account for the ramped-up activity of retail investors?

4. What are your best strategic ideas for the rest of 2022? (either specific investments, rules to live by, or both)

Participants

Moderator: Robert Isbitts - Co-Founder and Chief Investment Strategist, Sungarden Investment Publishing LLC

Panelist: Todd Hedtke - Chief Investment Officer, Allianz

Panelist: Melissa Joy - Founder, Pearl Planning

Organic Growth (Marketing and Business Development) Workshop

3:40pm - 5:00pm
RIA Edge Workshop

This workshop will provide attendees with a framework for benchmarking and assessing their current growth rates and tactics – and most importantly, identifying opportunities and strategies for increasing future organic growth. Specifically, this workshop will feature consultants and industry experts who will offer prescriptive advice and guidance on how to implement marketing, business development and referral strategies that will lead to consistent, repeatable growth.

3:45

Lead Presenter: David Devoe, CEO and Founder, Devoe & Co

4:30

Panel:

Moderator: Megan Carpenter, CEO, FiComm

Panelist: Carina Diamond, Chief Experience Officer, Managing Partner, Dakota Wealth Mangement

Tom Westhoff, our VP, Global Sales, Practifi

Brian Leitner, CFP®, ChFC®, Head of Mariner Platform Solutions, Mariner Platform Services

Participants

Lead Speaker: David DeVoe - CEO and Founder, DeVoe & Company

Lead Speaker: Megan Carpenter - CEO & Co-Founder, FiComm Partners, LLC

Panelist: Carina Diamond - Chief Experience Officer, Managing Partner, Dakota Wealth Management

Panelist: Brian Leitner, CFP®, ChFC® - Head of Mariner Platform Solutions, Mariner Wealth Advisors

Panelist: Tom Westhoff - VP Global sales, Practifi

CTO Perspectives - Top Tech Trends

3:40pm - 4:20pm
WealthStack

Our panel of CTOs discuss the areas of technology and innovation that are most top-of-mind in 2022: From the things that keep them up at night to the things they're most excited about! This panel discussion with give you a rare glimpse into the nuances and issues facing the tech leaders of fast-growing and tech-adopted firms!

Participants

Moderator: Gavin Spitzner - President, Wealth Consulting Partners

Panelist: Christine Cataldo - Chief Technology & Digital Officer, Mercer Advisors

Panelist: Jeff Haines - Enterprise Architect, Thrivent Advisor Network

InsideETFs Visionaries: Finding Long-Term Opportunities in a Short-Term World: Lessons Learned over 50 Years on Wall Street

4:20pm - 4:40pm
InsideETFs

Investors today are bombarded with headlines and "tweets" about the market, interest rates, the economy, and other important but unknowable issues. When the news cycle seems overwhelming, it's important to take a step back and reflect on timeless investment truths that look beyond the current headlines, and to recognize how advisors help clients stay focused on their long-term financial plans. With that goal in mind, we will draw on Davis' fifty years of successful investing to share the timely and timeless lessons we've learned about navigating ever-changing markets, uncovering opportunities, and the role advisors play in helping clients keep emotions in check

Participants

Speaker: Chris Davis - Chairman and Portfolio Manager, Davis Advisors

WealthStack Visionary: The End Of Generic Investing-Growing Your Business For The Clients You Serve With The Help Of Technology

4:20pm - 5:00pm
WealthStack

There is a great uncertainty among most consumers today around whether they can build the wealth they'll need for the future, with two in five Americans saying that it will take "a miracle" for them to retire. People clearly need quality financial guidance from advisors like you, and they need it to be customized to help them reach their goals.

Hear from Vise Co-founder and CEO Samir Vasavada and a special guest on how to tap technology to move beyond generic investment strategies for your clients, and the best ways to think about growing and scaling your business during these uncertain times.

Participants

Moderator: Davis Janowski - Senior Technology Editor, WealthManagement.com

Keynote: Samir Vasavada - Chief Executive Officer, Vise

Speaker: Runik Mehrotra - President and Chief Investment Officer, Vise

InsideETFs Visionaries: The Return Implications Of Climate Risk

4:40pm - 5:00pm
InsideETFs

Investors are being increasingly aware of the financial and economic impact of adverse climate scenarios. Delayed or insufficient policy changes to address climate change are likely to result in higher global temperatures, lower terminal growth rates, and higher levels of risk premia across asset classes. This results in lower nominal and real potential returns across asset classes in adverse climate scenarios.

Participants

Speaker: Robert Bush - Senior Research Analyst Thought Leadership, DWS Research Institute

Happy Hour in Expo Hall - Sponsored by TIFIN Wealth

5:00pm - 6:00pm
Networking

Leading EDGE Stage 5:10-5:30 - Best Practices in Talent Management

5:05pm - 5:30pm
Leading Edge Stage

Martine Lellis, Chief Talent and Administrative Officer, Mercer Advisors

Participants

Martine Lellis - Chief Talent and Administrative Officer., Mercer Advisors

Party Under the Stars

7:25pm - 9:25pm

SCHEDULE

2023 AGENDA COMING SOON - SEE WEALTH MANAGEMENT EDGE 2022 DAY 2 BELOW - 01/06/2022

WealthManagement EDGE

May 21 - 24, 2023
The Diplomat Beach Resort
Hollywood, Florida

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8:00AM						**8:15am** - Town Hall on the Leading EDGE Stage - 8:15-8:45	**8:00am** - Registration and Breakfast Expo Hall				**8:00am** - If Hybrid Advice Is The Answer, Why Aren't We There Yet?	**8:00am** - Women in ETFs Breakfast: Entrepreneurial Spirit Within ETFs

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9:00AM	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice	**9:00am** - Chairs Remarks **9:05am** - EDGE Visionary: The Future of Advice: Embracing an Abundance Mindset **9:25am** - EDGE Visionary: An Expert Look at the Fed, Inflation and Equity Multiples **9:45am** - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice

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10:00AM		**10:55am** - Chairs Remarks				**10:25am** - Innovation Demonstrations	**10:25am** - Morning Networking and Refreshment Break in Expo Hall	**10:55am** - Chairs Remarks			**10:55am** - Chairs Remarks	
11:00AM	**11:25am** - Accelerating Diversity, Equity & Inclusion in the Wealth, Asset Management and WealthTech Industries Think Tank (11.30 - 1.30)	**11:00am** - InsideETFs Visionary: Russell Indexes – Indexing into the future **11:30am** - The Truth About ESGs						**11:00am** - Driving the Next Generation of RIA Growth – How Technology, M&A and New Perspectives Will Power the Future of the RIA Channel **11:30am** - RIA CEO All Star Panel			**11:00am** - WealthStack Visionary: The Embedded Wealth Stack and the Opportunities Embedded Finance Brings to Wealth Management **11:30am** - Where are VCs and PEs Investing in the Next Wave of WealthTech and InvestTech	

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12:00PM		**12:10pm** - Invesco QQQ Lunch session				**12:10pm** - Innovation Demonstrations	**12:10pm** - Lunch in Expo Hall			**12:10pm** - Accelerating Diversity, Equity & Inclusion in the Wealth, Asset Management and WealthTech Industries (11.30 - 1.30)		

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1:00PM			**1:05pm** - Chair's Welcome **1:10pm** - Do Alternative Investment Strategies Improve Investor Outcomes? **1:50pm** - Accessing Emerging Investment Opportunities Through Thematics	**1:05pm** - Chair's Welcome **1:10pm** - Allocation Nation: Winning Strategies for Any Portfolio **1:50pm** - Strategies to Attract and Retain Younger Investors	**1:05pm** - Chair's Welcome **1:10pm** - How to Create Value Through ESG Investing **1:50pm** - Uncovering Value with Actively Managed Fixed Income				**1:05pm** - Chair's Welcome **1:10pm** - Valuation & M&A Workshop		**1:05pm** - Chair's Welcome **1:10pm** - The Value of Advice: Articulating and Demonstrating Your True “Alpha” to Clients and Prospects **1:50pm** - Democratization of Access to the Investment Experience: How Technology is enabling investors to access new markets	

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2:00PM			**2:30pm** - Are TIPS a Good Inflation Hedge?	**2:30pm** - ETFs vs. Direct Indexing: What Does the Future Hold?	**2:30pm** - Regulatory Updates - ETF Changes and Challenges						**2:30pm** - Going Global: Is the RIA Business Model the Future of Global Wealth Management?	
3:00PM		**3:35pm** - Chair **3:40pm** - Vital Signs: 4 Key Investment Factors For Today's Professional Investor				**3:10pm** - Innovation Demonstrations	**3:10pm** - Afternoon Networking and Refreshment Break in Expo Hall – Ice Cream Social Sponsored by: American Century Services LLC		**3:35pm** - Chair **3:40pm** - Organic Growth (Marketing and Business Development) Workshop		**3:35pm** - Chair **3:40pm** - CTO Perspectives - Top Tech Trends	

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4:00PM		**4:20pm** - InsideETFs Visionaries: Finding Long-Term Opportunities in a Short-Term World: Lessons Learned over 50 Years on Wall Street **4:40pm** - InsideETFs Visionaries: The Return Implications Of Climate Risk									**4:20pm** - WealthStack Visionary: The End Of Generic Investing-Growing Your Business For The Clients You Serve With The Help Of Technology	
5:00PM						**5:05pm** - Leading EDGE Stage 5:10-5:30 - Best Practices in Talent Management	**5:00pm** - Happy Hour in Expo Hall - Sponsored by TIFIN Wealth					
6:00PM												

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7:00PM	**7:25pm** - Party Under the Stars	**7:25pm** - Party Under the Stars	**7:25pm** - Party Under the Stars	**7:25pm** - Party Under the Stars	**7:25pm** - Party Under the Stars	**7:25pm** - Party Under the Stars	**7:25pm** - Party Under the Stars	**7:25pm** - Party Under the Stars	**7:25pm** - Party Under the Stars	**7:25pm** - Party Under the Stars	**7:25pm** - Party Under the Stars	**7:25pm** - Party Under the Stars

Registration and Breakfast in Expo Hall

8:00am - 8:30am
Main Conference

Can Money Buy Happiness?

8:30am - 8:45am
Main Conference

The 2021 Herbers & Company Consumer Behavior study reveals some striking results about money vs. level of happiness.

Participants

Speaker: Sonya Lutter - Director of Institutional Research and Education, Herbers & Co.

Teamwork Works

8:45am - 9:00am
Main Conference

Fast-track employee management and productivity by unlocking the keys to effective advisory teams.

Participants

Speaker: Angie Herbers - Founder & Chief Executive, Herbers and Co.

Chair's Remarks

9:00am - 9:05am
Main Conference

Participants

Mark Bruno - Managing Director, Wealth Management, Informa Connect

Welcome and Opening Address: How to make Planning More Efficient

9:05am - 9:45am
Main Conference

Financial planning may be valuable for clients, but it's time-consuming to deliver as a financial advisor, which impacts everything from the price that advisors charge for a financial plan, to the breadth of clients that can be served, and the staffing and technology infrastructure to deliver financial planning advice. In this session, we explore the latest Kitces Research study on "How Financial Advisors Really Do Financial Planning", to understand how long it really takes to create and deliver a financial plan, where time-savings opportunities are (or are not), the role of staff support in scaling financial advice, how technology impacts planning efficiencies, and the interaction between planning expertise (in the form of advanced designations like CFP certification), experience, and niche specializations, in making the delivery of financial planning more efficient.

Participants

Keynote Speaker: Michael Kitces - Chief Financial Planning Nerd, Kitces.com

EDGE Visionary: Crypto Projected to Generate $5B in Advisory Fees over next 5 Years. How To Get Your Share – Even if You Hate Bitcoin

9:45am - 10:25am
Main Conference

Whether you believe digital assets are a fad/fraud, or a revolutionary technology that will transform commerce on a planetary scale, it offers an unprecedented opportunity for you to attract new clients and AUM. In this provocative session, you'll gain vital knowledge about blockchain and digital assets, enabling you to have meaningful conversations with your clients– helping you serve them while benefiting your own advisory practice.

Participants

Keynote Speaker: Ric Edelman - Founder, Digital Assets Council of Financial Professionals

Morning Refreshment and Networking Break

10:25am - 10:55am
Networking

Town Hall with Ric Edelman

10:35am - 10:55am
Leading Edge Stage

Participants

Ric Edelman - Founder, Digital Assets Council of Financial Professionals

Chairs Remarks

10:55am - 11:00am
InsideETFs

Participants

Dodd Kittsley - National Director, Davis Advisors

Chair's Remarks

10:55am - 11:00am
RIA Edge Workshop

Participants

Graham Thomas - Director, Strategic Partnerships, Wealth Management, Informa Connect

Chairs Remarks

10:55am - 11:00am
WealthStack

Participants

Runik Mehrotra - President and Chief Investment Officer, Vise

InsideETFs Visionary: Economics and the Future of Money

11:00am - 11:40am
InsideETFs

Inside ETFs Visionary: A History of the Financial Crisis and Lessons Learned for the Future

With the advent of the financial crisis in 2008 and the role that the federal government played to put the U.S. economy on the road to recovery, what did we learn from that process and how can we plan for continued stability in another unprecedented recovery Post-Covid? As one of the original members of the U.S. Department of the Treasury/Federal Reserve Transition Team and then Treasurer of the United States for (delete "the following") seven years followed by the recent term as part of the Biden Treasury Transition Team, Treasurer Rios provides her perspectives on lessons learned from her tenure during (change to "two" instead of one) of the most consequential times of our nation's economic history and how it impacts consumer wealth-building today.

Participants

Rosie Rios - 43rd Treasurer of the United States and CEO, Red River Associates

Talent Management Panel: Aligning Organizational Design and Talent Development to Drive Growth

11:00am - 11:40am
RIA Edge Workshop

This session will provide a framework for evaluating your organizational design and structure – and mapping talent directly into the roles that will ignite growth and drive future success.

Participants

Moderator: Brad Bueermann - CEO, FP Transitions

Panelist: Martine Lellis - Chief Talent and Administrative Officer., Mercer Advisors

Speaker: Brandon Odell - Partner, The Ensemble Practice LLC

Panelist: Lisa Crafford - Director, Head of Business Consulting, BNY Mellon | Pershing

WealthStack Visionary: Wealth Management + Formula 1-What Firms Can Learn From the World's Elite Racing League

11:00am - 11:40am
WealthStack

At first glance, it may seem like wealth management and motor racing have nothing in common, but there's plenty to learn from the world's most prestigious racing teams. Akin to wealth management firms, these teams operate in a tightly regulated space, relying on specialized roles, integrated systems, and innovative technology to perform their best. In this session, we'll take a look into how they operate and the valuable lessons we can put into practice.

Participants

Keynote: Adrian Johnstone - President and Co-Founder, Practifi

New Skool Podcast Live with Michael Kitces on the Leading EDGE Stage

11:00am - 11:40am
Leading Edge Stage

Join The New Skool Podcast hosts Meg Carpenter and Candice Carlton for a live recording with special guest Michael Kitces. The New Skool is an award-winning podcast that demonstrates the power of authenticity and vulnerability in the old school world of finance. This live recording with Michael Kitces will explore Michael's innate ability to be authentic in everything he does. The live conversation will also dive into powerful examples of how the New Skool mindset drives continued growth and expansion for one of our industry's greatest influencers.

Participants

Megan Carpenter - CEO & Co-Founder, FiComm Partners, LLC

Candice Carlton - EVP and Head of Advisor Education, FiComm Partners LLC

Michael Kitces - Chief Financial Planning Nerd, Kitces.com

Diversifying from Traditional Asset Classes: Top 5 Crypto/NFT/DeFi Questions

11:40am - 12:20pm
InsideETFs

Top 5 Crypto/NFT/DeFi Questions

Participants

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

Panelist: Chris King - CEO, Eaglebrook

Panelist: Roxanna Islam CFA - Associate Director of Research, VettaFi

Panelist: Sharon Liebowitz - Senior Director, Innovation & Strategy, S&P Dow Jones Indices

M&A and Talent Acquisition: Hire or Acquire? Navigating the Battle for Talent in the RIA

11:40am - 12:20pm
RIA Edge Workshop

The panel will focus on the competition for talent and how RIAs can effectively recruit, or use M&A, as a way to add new talent and accelerate their growth.

Participants

Moderator: Mark Bruno - Managing Director, Wealth Management, Informa Connect

Panelist: John Furey - Managing Partner, Advisor Growth Strategies

Panelist: Brandon Kawal - Principal, Advisor Growth Strategies

Panelist: Frank Bub - Head of Wealth Management Consulting, CAPTRUST

Scale and Sophistication: Technology to Deliver Customized Wealth Management, Elevated Client Experiences

11:40am - 12:20pm
WealthStack

This session will highlight how some of the most innovative advisors and technology providers are delivering highly customized – but also highly efficient – services to investors. Specifically, this panel will examine strategies and tools to create investment portfolios that align with clients' values, goals and risk profiles.

Participants

Moderator: Davis Janowski - Senior Technology Editor, WealthManagement.com

Panelist: Pete Hess - President, Mid Markets, InvestCloud

Panelist: James Mackinaw - Head of U.S. Client Engagement, BlackRock Aladdin Wealth Tech

Panelist: Jack Swift - President and CRO, TIFIN

Lunch for all Participants in Expo Hall

12:20pm - 1:25pm
Networking

Town Hall with Rosie Rios

12:20pm - 12:40pm
Leading Edge Stage

Town Hall with Rosie Rios, 43rd Treasurer of the United States

CEO, Red River Associates

Participants

Rosie Rios - 43rd Treasurer of the United States and CEO, Red River Associates

Lunch Session: All Things Digital Assets

12:20pm - 1:25pm
InsideETFs- Lunch Session: All Things Digital Assets

A lively discussion around digital asset markets, digital asset regulation & digital asset ETF regulation.

Participants

Speaker: David LaValle - Senior Managing Director, Global Head of ETFs, Grayscale Investments

WealthStack Visionary: Blending Behavioral Psychology with WealthTech: The New Frontier of Fiduciary Advice

12:20pm - 1:25pm
WealthStack- Lunch Session: Keynote Address

WealthStack Visionary: Blending Behavioral Psychology with WealthTech: The New Frontier of Fiduciary Advice

The importance of behavioral finance as a central piece of the advisor value proposition is increasingly well-understood. However, most current efforts around incorporating behavioral finance revolve around simple client education. While education is foundational, it must be augmented by embedded technology if it is to be as effective as desired. Join psychologist and New York Times bestselling author Dr. Daniel Crosby for an applied look at the future of behavioral tech.

Participants

Daniel Crosby - Chief Behavioral Officer, Orion Advisor Technology

Celebrity Fireside: The Family Business - Secrets to Success On & Off the Field

1:25pm - 2:05pm

NFL legends Eli and Archie Manning will join us to discuss the secrets of their success on the football field and in the business world – while also sharing their perspectives on managing family and intergenerational wealth in this exclusive keynote Q&A.

Participants

Speaker: Eli Manning - Two-Time Super Bowl-Winning Quarterback & Two-Time Super Bowl MVP, Formerly New York Giants

Speaker: Archie Manning - Former NFL Pro Quarterback, Formerly New Orleans Saints

Interviewer: Meghan McCartan - Managing Director, Head of Marketing, Hightower Advisors

Wealth 2.0: The Nexus of Digital Services and Human Advice

2:05pm - 2:45pm

As more advisors have relied on digital platforms and tools to deliver advice over the last two years, the wealth management industry has undergone a major transformation. Clients and prospects are demanding and expecting more convenience, increased access and a heightened digital experience from their wealth managers. The “human” side of advice will forever be at the core, but the advent of digital platforms and communication tools will shape the future of the industry. How should advisory firms balance and integrate their digital services and human advice? This session will offer an inside look at the wealth management firm of the future.

Participants

Moderator: Diana Britton - Managing Editor, WealthManagement.com

Brent Weiss - Co- Founder, Facet Wealth

Megan Gorman - Founder & Managing Partner, Chequers Financial Management

Networking and Refreshment Break in the Expo Hall

2:45pm - 3:10pm
Networking

Town Hall with Michael Kitces

2:45pm - 3:10pm
Leading Edge Stage

Participants

Michael Kitces - Chief Financial Planning Nerd, Kitces.com

Chair's remarks

3:10pm - 3:15pm
InsideETFs

Participants

Dodd Kittsley - National Director, Davis Advisors

Chair's remarks

3:10pm - 3:15pm
RIA Edge Workshop

Participants

Graham Thomas - Director, Strategic Partnerships, Wealth Management, Informa Connect

Chair's remarks

3:10pm - 3:15pm
WealthStack

Participants

Thomas Canals - Account Executive, Vise

InsideETFs Visionaries

3:15pm - 3:35pm
InsideETFs

The Next 20 Years of ETFs…

As our industry continues to evolve, we have seen ETFs play a significant role in almost every global sector. The financial atmosphere is accepting new ways of investing and utilizing technology to personalize how we invest and even adopt new forms of currencies. In this discussion, I look forward to discussing what I believe is to come in ETFs and the overall investment landscape.

Reggie Brown, Principal, GTS

Participants

Visionary: Reggie Browne - Principal, GTS

Advanced Financial Planning Workshop

3:15pm - 5:15pm
RIA Edge Workshop

This workshop will be a deep-dive into the latest financial planning, retirement income and goals-based planning strategies being implement by the industry's top advisors. It will offer insights into how to create customizable – but living, breathing financial plans – and how new investment and technology solutions can help address a range of client objectives and needs.

3:15-4:15

Presenter: Jamie Hopkins, Managing Partner of Wealth Solutions Carson

4:15-4:45

Presenter: Mark Paulson, Vice President, Hedge Business Development, Allianz Life

4:45-5:15

Advanced Financial Planning Panel:

Moderator: Fred Barstein, Founder & CEO, TRAU, TPSU and 401KTV

Panelists: Andrew Altfest, CFP®, MBA

President, Altfest Personal Wealth Management and Founder & CEO, FP Alpha

Melissa Joy, CFP, Founder, Pearl Planning

Participants

Speaker: Jamie Hopkins - Managing Partner of Wealth Solutions, Carson Group

Speaker: Mark Paulson - Vice President, Hedge Business Development, Allianz Life

Speaker: Andrew Altfest - President, Altfest Personal Wealth Management

Speaker: Fred Barstein - Founder & CEO, TRAU, TPSU, and 401kTV

Speaker: Melissa Joy - Founder, Pearl Planning

Scale vs. Service: How Technology Can Allow Wealth Managers to Personalize the Delivery of Planning, Investments and "Outcome-Oriented Advice"

3:15pm - 3:55pm
WealthStack

Participants

Moderator: William Trout - Director of Wealth Management, Javelin Strategy & Research

Panelist: Shannon Spotswood - President, RFG Advisory

Panelist: Adrian Johnstone - President and Co-Founder, Practifi

Policy Implications on Investor Portfolios

3:35pm - 3:55pm
InsideETFs

The post-pandemic era has been characterized by a coordinated effort to simulate the global economy. This fiscal policy has created a mismatch between easy money and a lack of goods and services, leaving central bankers vowing to fight inflation. Can they walk a fine line and engineer a soft landing, or will they over tighten and cause a recession?

Participants

Jeffrey Sherman - Deputy Chief Investment Officer, DoubleLine Capital

The State of Bitcoin ETFs

3:55pm - 4:35pm
InsideETFs

When will a spot bitcoin ETF be approved? What are the current bitcoin alternatives for advisors? What role should crypto play in a portfolio? We'll discuss these key questions and more with our expert panel.

Participants

Moderator: Nate Geraci - President, The ETF Store and Host, ETF Prime

Panelist: David LaValle - Senior Managing Director, Global Head of ETFs, Grayscale Investments

Panelist: Jackson Wood - Portfolio Manager, Freedom Day Solutions

Panelist: Bruno Sousa - Head of Global Expansion and Interim Head of U.S., Hashdex

The Art And Science Of Client Experience: Practical Ways To Use Data To Drive Deeper Engagement And Growth

3:55pm - 4:35pm
WealthStack

There was a time when the idea of a data-driven client experience was novel. Today it is table-stakes for any progressive firm. But what does that look like?

In this presentation, panelists Jud Mackrill and Julie Littlechild will examine what it really means to use data to truly modernize your business and client experience. They will share specific examples of how firms are capturing and using data to not only drive efficiency, but to drive profound engagement and meaningful growth.

Participants

Moderator: Megan Carpenter - CEO & Co-Founder, FiComm Partners, LLC

Panelist: Julie Littlechild - Founder, Absolute Engagement

Panelist: Jud Mackrill - CEO & Cofounder, Milemarker

Panelist: Robert Sofia - CEO, Snappy Kraken

What You Need to Know About the Risks, Rewards and Opportunities of Investing in China

4:35pm - 5:15pm
InsideETFs

Participants

Moderator: Julie Abbett - ETF Sales, J.P. Morgan Chase & Co

Panelist: Perth Tolle - Founder, Life + Liberty Indexes

WealthStack Visionary: Disruptive Tech and the Evolution of Thematic Investing

4:35pm - 4:55pm
WealthStack

Disruptive Tech and the Evolution of Thematic Investing

Participants

Pavel Vaynshtok - Managing Director, Global Head of Strategy Indices, S&P Dow Jones Indices

The 2022 Protective Investing Playbook

4:55pm - 5:15pm
WealthStack

From healthcare expenses to education and income needs, people are ever more responsible for their own financial security. With international crises, historically-stretched equity valuations, and record-low interest rates, it hasn't been easy to avoid distraction and keep clients' heads in the game.

To help investors stay the course and get their portfolios over this wall of worry, advisors are increasingly turning to a class of defined-outcome financial solutions known as protective investments.

Halo Investing's 2022 Protective Investing Playbook uses a level-headed approach to help advisors confidently lead investment and retirement conversations with clients.

In this strategic overview, Halo Investing's Head of Business Development Joanna Kanakis will discuss:

· Offensive plays to help improve upside capture while mitigating downside exposure.

· Defensive plays for varying levels of principal protection.

· How protective investing can improve client outcomes while differentiating an advisor's capabilities.

Participants

Speaker: Joanna Kanakis - Executive Vice President, Head of Business Development, Halo Investing, LLC

Happy Hour in Expo Hall

5:15pm - 6:45pm
Networking

M&A Limits Redefined

5:15pm - 6:15pm
Leading Edge Stage

John Furey and Brandon Kawal will share insights on the changing battle lines for M&A from the latest "RIA Deal Room" report, sponsored by BlackRock. Understanding both the buyer landscape and a seller's "story" matters now more than ever. Stop by for highlights from the research including AGS's perspective on the evolution of transaction structures, increased interest from institutional capital, and what the deceleration in the median-adjusted EBITDA multiple means for the industry.

Participants

Brandon Kawal - Principal, Advisor Growth Strategies

John Furey - Managing Partner, Advisor Growth Strategies

Pool Party - Sponsored by InvestCloud

8:00pm - 10:00pm

InvestCloud invites you to enjoy a night with great food.....

SCHEDULE

2023 AGENDA COMING SOON - SEE WEALTH MANAGEMENT EDGE 2022 DAY 3 BELOW - 02/06/2022

WealthManagement EDGE

May 21 - 24, 2023
The Diplomat Beach Resort
Hollywood, Florida

TIME	INSIDEETFS	INSIDEETFS- LUNCH SESSION: ALL THINGS DIGITAL ASSETS	LEADING EDGE STAGE	MAIN CONFERENCE	NETWORKING	RIA EDGE WORKSHOP	WEALTHSTACK	WEALTHSTACK- LUNCH SESSION: KEYNOTE ADDRESS
8:00AM				**8:00am** - Registration and Breakfast in Expo Hall **8:30am** - Can Money Buy Happiness? **8:45am** - Teamwork Works				
9:00AM				**9:00am** - Chair's Remarks **9:05am** - Welcome and Opening Address: How to make Planning More Efficient **9:45am** - EDGE Visionary: Crypto Projected to Generate $5B in Advisory Fees over next 5 Years. How To Get Your Share – Even if You Hate Bitcoin				
10:00AM	**10:55am** - Chairs Remarks		**10:35am** - Town Hall with Ric Edelman		**10:25am** - Morning Refreshment and Networking Break	**10:55am** - Chair's Remarks	**10:55am** - Chairs Remarks	

SCHEDULE

2023 AGENDA COMING SOON - SEE WEALTH MANAGEMENT EDGE 2022 DAY 3 BELOW - 02/06/2022

WealthManagement EDGE

May 21 - 24, 2023
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11:00AM	**11:00am** - InsideETFs Visionary: Economics and the Future of Money **11:40am** - Diversifying from Traditional Asset Classes: Top 5 Crypto/NFT/DeFi Questions		**11:00am** - New Skool Podcast Live with Michael Kitces on the Leading EDGE Stage			**11:00am** - Talent Management Panel: Aligning Organizational Design and Talent Development to Drive Growth **11:40am** - M&A and Talent Acquisition: Hire or Acquire? Navigating the Battle for Talent in the RIA	**11:00am** - WealthStack Visionary: Wealth Management + Formula 1-What Firms Can Learn From the World's Elite Racing League **11:40am** - Scale and Sophistication: Technology to Deliver Customized Wealth Management, Elevated Client Experiences	
12:00PM		**12:20pm** - Lunch Session: All Things Digital Assets	**12:20pm** - Town Hall with Rosie Rios		**12:20pm** - Lunch for all Participants in Expo Hall			**12:20pm** - WealthStack Visionary: Blending Behavioral Psychology with WealthTech: The New Frontier of Fiduciary Advice
1:00PM	**1:25pm** - Celebrity Fireside: The Family Business - Secrets to Success On & Off the Field	**1:25pm** - Celebrity Fireside: The Family Business - Secrets to Success On & Off the Field	**1:25pm** - Celebrity Fireside: The Family Business - Secrets to Success On & Off the Field	**1:25pm** - Celebrity Fireside: The Family Business - Secrets to Success On & Off the Field	**1:25pm** - Celebrity Fireside: The Family Business - Secrets to Success On & Off the Field	**1:25pm** - Celebrity Fireside: The Family Business - Secrets to Success On & Off the Field	**1:25pm** - Celebrity Fireside: The Family Business - Secrets to Success On & Off the Field	**1:25pm** - Celebrity Fireside: The Family Business - Secrets to Success On & Off the Field

SCHEDULE

2023 AGENDA COMING SOON - SEE WEALTH MANAGEMENT EDGE 2022 DAY 3 BELOW - 02/06/2022

WealthManagement EDGE

May 21 - 24, 2023
The Diplomat Beach Resort
Hollywood, Florida

TIME	INSIDEETFS	INSIDEETFS- LUNCH SESSION: ALL THINGS DIGITAL ASSETS	LEADING EDGE STAGE	MAIN CONFERENCE	NETWORKING	RIA EDGE WORKSHOP	WEALTHSTACK	WEALTHSTACK- LUNCH SESSION: KEYNOTE ADDRESS
2:00PM	**2:05pm** - Wealth 2.0: The Nexus of Digital Services and Human Advice	**2:05pm** - Wealth 2.0: The Nexus of Digital Services and Human Advice	**2:05pm** - Wealth 2.0: The Nexus of Digital Services and Human Advice **2:45pm** - Town Hall with Michael Kitces	**2:05pm** - Wealth 2.0: The Nexus of Digital Services and Human Advice	**2:05pm** - Wealth 2.0: The Nexus of Digital Services and Human Advice **2:45pm** - Networking and Refreshment Break in the Expo Hall	**2:05pm** - Wealth 2.0: The Nexus of Digital Services and Human Advice	**2:05pm** - Wealth 2.0: The Nexus of Digital Services and Human Advice	**2:05pm** - Wealth 2.0: The Nexus of Digital Services and Human Advice
3:00PM	**3:10pm** - Chair's remarks **3:15pm** - InsideETFs Visionaries **3:35pm** - Policy Implications on Investor Portfolios **3:55pm** - The State of Bitcoin ETFs					**3:10pm** - Chair's remarks **3:15pm** - Advanced Financial Planning Workshop	**3:10pm** - Chair's remarks **3:15pm** - Scale vs. Service: How Technology Can Allow Wealth Managers to Personalize the Delivery of Planning, Investments and "Outcome-Oriented Advice" **3:55pm** - The Art And Science Of Client Experience: Practical Ways To Use Data To Drive Deeper Engagement And Growth	

SCHEDULE

2023 AGENDA COMING SOON - SEE WEALTH MANAGEMENT EDGE 2022 DAY 3 BELOW - 02/06/2022

WealthManagement EDGE

May 21 - 24, 2023
The Diplomat Beach Resort
Hollywood, Florida

TIME	INSIDEETFS	INSIDEETFS- LUNCH SESSION: ALL THINGS DIGITAL ASSETS	LEADING EDGE STAGE	MAIN CONFERENCE	NETWORKING	RIA EDGE WORKSHOP	WEALTHSTACK	WEALTHSTACK- LUNCH SESSION: KEYNOTE ADDRESS
4:00PM	**4:35pm** - What You Need to Know About the Risks, Rewards and Opportunities of Investing in China						**4:35pm** - WealthStack Visionary: Disruptive Tech and the Evolution of Thematic Investing **4:55pm** - The 2022 Protective Investing Playbook	
5:00PM			**5:15pm** - M&A Limits Redefined		**5:15pm** - Happy Hour in Expo Hall			
6:00PM								
7:00PM								
8:00PM	**8:00pm** - Pool Party - Sponsored by InvestCloud	**8:00pm** - Pool Party - Sponsored by InvestCloud	**8:00pm** - Pool Party - Sponsored by InvestCloud	**8:00pm** - Pool Party - Sponsored by InvestCloud	**8:00pm** - Pool Party - Sponsored by InvestCloud	**8:00pm** - Pool Party - Sponsored by InvestCloud	**8:00pm** - Pool Party - Sponsored by InvestCloud	**8:00pm** - Pool Party - Sponsored by InvestCloud

Registration & Breakfast

8:00am - 9:00am
Networking

Welcome and EDGE Visionaries: Insights from RIA Innovators: How WealthTech Will Re-Shape Financial Advice

9:00am - 9:40am

Participants

Moderator: Mark Bruno - Managing Director, Wealth Management, Informa Connect

Visionary: Greg Friedman - Chief Strategy Officer, Wealthspire Advisors

Visionary: Alex Murguia - Managing Principal, McLean Asset Management

The Convergence of WealthTech and Investment Management: The New "Efficient Frontier"

9:40am - 10:20am

It's no secret that technology has transformed the way individuals and businesses manage their finances. Over the last decade, the industry has reached a new "efficient frontier" thanks to the convergence of wealthtech and investment management. Take a deep dive into this evolving landscape with a panel of experts as they discuss:

- Top trends that are driving this change
- Practical advice on scaling your practice through the use of technology
- How to make data actionable
- Why the human element is still critical with it comes to investment management
- And much more

Participants

Moderator: Shannon Rosic - VP of Marketing, Flyer Financial Technologies

Speaker: Penny Phillips - President & Co-Founder, Journey Strategic Wealth

Speaker: Khushal Pushtoonyar - Head of Product Management, Emotomy

Speaker: Ryan Donovan - Senior Vice President, Orion Advisor Technology

Speaker: Jon Mauney - Lead for Betterment for Advisors, Betterment

Morning Networking and Refreshment Break in Expo Hall

10:20am - 10:55am
Networking

Macro Economic Update: What's In Store For 2022

10:55am - 11:35am
InsideETFs

-The new, new normal - how to navigate rising rates and slowing growth

-60/40 is dead - now what?

-Alternative options for yield-seekers? Crypto? Natural resources? Real Estate?

-ETFs and Personalization

-Where are the gaps, if any, in the ETF universe?

Participants

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

Speaker: Kenneth Polcari - Founder and Managing Partner, Kace Capital Advisors

Wealth Management EDGE Wrap Up - RIA Study Results

11:35am - 12:00pm
RIA Edge

Participants

Mark Bruno - Managing Director, Wealth Management, Informa Connect

Wealth Management EDGE Concludes

12:00pm - 12:05pm

SCHEDULE

2023 AGENDA COMING SOON - SEE WEALTH MANAGEMENT EDGE 2022 DAY 4 BELOW - 03/06/2022

TIME	INSIDEETFS	NETWORKING	RIA EDGE
8:00AM		**8:00am** - Registration & Breakfast	
9:00AM	**9:00am** - Welcome and EDGE Visionaries: Insights from RIA Innovators: How WealthTech Will Re-Shape Financial Advice **9:40am** - The Convergence of WealthTech and Investment Management: The New “Efficient Frontier”	**9:00am** - Welcome and EDGE Visionaries: Insights from RIA Innovators: How WealthTech Will Re-Shape Financial Advice **9:40am** - The Convergence of WealthTech and Investment Management: The New “Efficient Frontier”	**9:00am** - Welcome and EDGE Visionaries: Insights from RIA Innovators: How WealthTech Will Re-Shape Financial Advice **9:40am** - The Convergence of WealthTech and Investment Management: The New “Efficient Frontier”
10:00AM	**10:55am** - Macro Economic Update: What’s In Store For 2022	**10:20am** - Morning Networking and Refreshment Break in Expo Hall	
11:00AM			**11:35am** - Wealth Management EDGE Wrap Up - RIA Study Results
12:00PM	**12:00pm** - Wealth Management EDGE Concludes	**12:00pm** - Wealth Management EDGE Concludes	**12:00pm** - Wealth Management EDGE Concludes