

SESSIONS

WEALTH MANAGEMENT EDGE AGENDA-DAY ONE - 31/05/2022

WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
Hollywood, Florida

Registration Opens

1:15pm - 2:15pm

Chair's Remarks

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

Chair's Remarks

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

Chair's Remarks

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

The Ultimate Guide on the Fundamentals of ETFs

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

Current Market Trends and New Indexes Factors on the Horizon: Where to allocate within Factor Based Investing

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

Discount Brokerage Firms, Robo Advisors, & Other Disruptive B2C WealthTech Solutions

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

Everything You Need to Know About Active ETFs

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

Digital Assets Understood

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

Next Gen Clients - An Investor Panel

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

Gamechangers: The Rise of ESG and Socially Responsible Investing

3:00pm - 4:30pm
InsideETFs Think Tank

The Next Generation of RIA Growth & Talent

3:00pm - 4:30pm
RIA Edge Think Tank

The Future of Advice: Re-imagining the Client Experience

3:00pm - 4:30pm
WealthStack Think Tank

Crypto, NFTs and Ethereum for Dummies

3:40pm - 4:30pm
InsideETFs U Workshop 1.0

Are Actively Managed ETFs Here to Stay?

3:40pm - 4:30pm
InsideETFs Workshop 3.0

Breaking Down the Barriers to Make Digital Assets Accessible

3:40pm - 4:30pm
WealthStack Workshop 2.0

Event Welcome and Industry Keynote Address

4:30pm - 5:00pm

Keynote Address: EDGE Visionary

5:00pm - 5:30pm

Welcome Reception in the Hotel Lobby

5:30pm - 7:00pm

Dine Arouds | EDGE Advisory Board Dinner | Media Dinner | Industry Dinner

7:00pm - 9:00pm

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WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
Hollywood, Florida

TIME	INSIDEETFs THINK TANK	INSIDEETFs U WORKSHOP 1.0	INSIDEETFs WORKSHOP 3.0	RIA EDGE THINK TANK	WEALTHSTACK THINK TANK	WEALTHSTACK WORKSHOP 2.0
1:00PM	1:15pm - Registration Opens	1:15pm - Registration Opens	1:15pm - Registration Opens	1:15pm - Registration Opens	1:15pm - Registration Opens	1:15pm - Registration Opens
2:00PM		2:15pm - Chair's Remarks 2:20pm - The Ultimate Guide on the Fundamentals of ETFs	2:15pm - Chair's Remarks 2:20pm - Current Market Trends and New Indexes Factors on the Horizon: Where to allocate within Factor Based Investing			2:15pm - Chair's Remarks 2:20pm - Discount Brokerage Firms, Robo Advisors, & Other Disruptive B2C WealthTech Solutions
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 Ethereum for Dummies	3:00pm - Digital Assets Understood 3:40pm - Are Actively Managed ETFs Here to Stay?	3:00pm - The Next Generation of RIA Growth & Talent	3:00pm - The Future of Advice: Re-imagining the Client Experience	3:00pm - Next Gen Clients - An Investor Panel 3:40pm - Breaking Down the Barriers to Make Digital Assets Accessible
4:00PM	4:30pm - Event Welcome and Industry Keynote Address	4:30pm - Event Welcome and Industry Keynote Address	4:30pm - Event Welcome and Industry Keynote Address	4:30pm - Event Welcome and Industry Keynote Address	4:30pm - Event Welcome and Industry Keynote Address	4:30pm - Event Welcome and Industry Keynote Address
5:00PM	5:00pm - Keynote Address: EDGE Visionary 5:30pm - Welcome Reception in the Hotel Lobby	5:00pm - Keynote Address: EDGE Visionary 5:30pm - Welcome Reception in the Hotel Lobby	5:00pm - Keynote Address: EDGE Visionary 5:30pm - Welcome Reception in the Hotel Lobby	5:00pm - Keynote Address: EDGE Visionary 5:30pm - Welcome Reception in the Hotel Lobby	5:00pm - Keynote Address: EDGE Visionary 5:30pm - Welcome Reception in the Hotel Lobby	5:00pm - Keynote Address: EDGE Visionary 5:30pm - Welcome Reception in the Hotel Lobby
6:00PM						
7:00PM	7:00pm - Dine Arounds EDGE Advisory Board Dinner Media Dinner Industry Dinner	7:00pm - Dine Arounds EDGE Advisory Board Dinner Media Dinner Industry Dinner	7:00pm - Dine Arounds EDGE Advisory Board Dinner Media Dinner Industry Dinner	7:00pm - Dine Arounds EDGE Advisory Board Dinner Media Dinner Industry Dinner	7:00pm - Dine Arounds EDGE Advisory Board Dinner Media Dinner Industry Dinner	7:00pm - Dine Arounds EDGE Advisory Board Dinner Media Dinner Industry Dinner

SESSIONS

WEALTH MANAGEMENT EDGE AGENDA-DAY TWO - 01/06/2022

WealthStack

May 31 (Pre-Conference Day) - June 3

The Diplomat Beach Resort
Hollywood, Florida

Registration & Breakfast

8:00am - 9:00am
Networking

Women in ETFs Breakfast

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

Chair's Remarks

9:00am - 9:05am

Keynote Address: EDGE Visionary

9:05am - 9:45am

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

9:45am - 10:25am

Morning Networking and Refreshment Break and WealthStack Speed Networking in the Exhibit Hall

10:25am - 11:00am
Networking

Industry Demos

10:25am - 11:00am
Leading EDGE Stage

Chair's Remarks

11:00am - 11:05am
InsideETFs

Chair's Remarks

11:00am - 11:05am
RIA Edge

Chair's Remarks

11:00am - 11:05am
WealthStack

Fireside: The Economic Foundations of the Macro Environment

11:05am - 11:35am
InsideETFs

Drivers and Reshaping the Next Generation of RIA Growth

11:05am - 11:35am
RIA Edge

The Embedded Wealth Stack and the Opportunities Embedded Finance Brings to Wealth Management

11:05am - 11:35am
WealthStack

The State of Bitcoin ETFs

11:35am - 12:15pm
InsideETFs

RIA CEO All Star Panel

11:35am - 12:15pm
RIA Edge

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

11:35am - 12:15pm
WealthStack

Lunch for all Participants

12:15pm - 1:15pm
Networking

InsideETFs Hall of Fame Induction Lunch Reception

12:15pm - 1:15pm
InsideETFs

Allocation Nation: Winning Strategies for Any Portfolio

1:15pm - 1:55pm
InsideETFs Alternative Track

To Outsource or Not to Outsource: That is the Question

1:15pm - 1:55pm
InsideETFs Track

Do Alternative Investment Strategies Improve Investor Outcomes?

1:15pm - 1:55pm
InsideETFs Equities Track

Valuation & M&A Workshop

1:15pm - 3:15pm
RIA Edge Workshop

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

1:15pm - 1:55pm
WealthStack

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

1:55pm - 2:35pm
InsideETFs Alternative Track

Uncovering Value with Actively Managed Fixed Income

1:55pm - 2:35pm
InsideETFs Track

Focusing Capital on the Long Term: The Case for Real Estate

1:55pm - 2:35pm
InsideETFs Equities Track

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

1:55pm - 2:35pm
WealthStack

Combining the Benefits of an Active Mutual Fund in 21st Century ETF Wrapper

2:35pm - 3:15pm
InsideETFs Alternative Track

Regulatory Updates - ETF Changes and Challenges

2:35pm - 3:15pm
InsideETFs Track

Commodities in your Portfolio-Risk or Reward?

2:35pm - 3:15pm
InsideETFs Equities Track

Tech Stack & Your RIA: From The Lens Of Different Industry Perspectives

2:35pm - 3:15pm
WealthStack

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WEALTH MANAGEMENT EDGE AGENDA-DAY TWO - 01/06/2022

WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
Hollywood, Florida

Afternoon Networking and Refreshment Break

3:15pm - 3:45pm
Networking

ESG Connector

3:15pm - 3:45pm
Connectors

Industry Demos

3:15pm - 3:45pm
Leading EDGE Stage

CIO Perspectives: The Top 3 Risks & Opportunities in 2022

3:45pm - 4:25pm
InsideETFs

Human Capital, Staffing and Compensation Workshop

3:45pm - 5:05pm
RIA Edge Workshop

CTO Perspectives - Top Tech Trends

3:45pm - 4:25pm
WealthStack

Investing in the Future

4:25pm - 5:05pm
InsideETFs

The Advisory Firm of the Future: Leading with Technology to Reinvent the Client Experience

4:25pm - 5:05pm
WealthStack

Happy Hour in Exhibit Hall + Demos

5:05pm - 6:05pm

Beach Party

7:30pm - 9:30pm

SCHEDULE

WEALTH MANAGEMENT EDGE AGENDA-DAY TWO - 01/06/2022

WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
Hollywood, Florida

TIME	CONNECTORS	INSIDEETF5	INSIDEETF5 ALTERNATIVE TRACK	INSIDEETF5 EQUITIES TRACK	INSIDEETF5 TRACK	LEADING EDGE STAGE	NETWORKING	RIA EDGE	RIA EDGE WORKSHOP	WEALTHSTACK	WOMEN IN ETF5 BREAKFAST
8:00AM							8:00am - Registration & Breakfast				8:00am - Women in ETF5 Breakfast
9:00AM	<p>9:00am - Chair's Remarks</p> <p>9:05am - Keynote Address: EDGE Visionary</p> <p>9:45am - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice</p>	<p>9:00am - Chair's Remarks</p> <p>9:05am - Keynote Address: EDGE Visionary</p> <p>9:45am - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice</p>	<p>9:00am - Chair's Remarks</p> <p>9:05am - Keynote Address: EDGE Visionary</p> <p>9:45am - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice</p>	<p>9:00am - Chair's Remarks</p> <p>9:05am - Keynote Address: EDGE Visionary</p> <p>9:45am - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice</p>	<p>9:00am - Chair's Remarks</p> <p>9:05am - Keynote Address: EDGE Visionary</p> <p>9:45am - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice</p>	<p>9:00am - Chair's Remarks</p> <p>9:05am - Keynote Address: EDGE Visionary</p> <p>9:45am - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice</p>	<p>9:00am - Chair's Remarks</p> <p>9:05am - Keynote Address: EDGE Visionary</p> <p>9:45am - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice</p>	<p>9:00am - Chair's Remarks</p> <p>9:05am - Keynote Address: EDGE Visionary</p> <p>9:45am - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice</p>	<p>9:00am - Chair's Remarks</p> <p>9:05am - Keynote Address: EDGE Visionary</p> <p>9:45am - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice</p>	<p>9:00am - Chair's Remarks</p> <p>9:05am - Keynote Address: EDGE Visionary</p> <p>9:45am - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice</p>	<p>9:00am - Chair's Remarks</p> <p>9:05am - Keynote Address: EDGE Visionary</p> <p>9:45am - The Future of Wealth Management: How Investment, Fintech and RIA channels are Converging to Change the Future of Advice</p>
10:00AM						10:25am - Industry Demos	10:25am - Morning Networking and Refreshment Break and WealthStack Speed Networking in the Exhibit Hall				

SCHEDULE

WEALTH MANAGEMENT EDGE AGENDA-DAY TWO - 01/06/2022

WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
Hollywood, Florida

TIME	CONNECTORS	INSIDEETFS	INSIDEETFS ALTERNATIVE TRACK	INSIDEETFS EQUITIES TRACK	INSIDEETFS TRACK	LEADING EDGE STAGE	NETWORKING	RIA EDGE	RIA EDGE WORKSHOP	WEALTHSTACK	WOMEN IN ETFS BREAK-FAST
11:00AM		<p>11:00am - Chair's Remarks</p> <p>11:05am - Fireside: The Economic Foundations of the Macro Environment</p> <p>11:35am - The State of Bitcoin ETFs</p>						<p>11:00am - Chair's Remarks</p> <p>11:05am - Drivers and Reshaping the Next Generation of RIA Growth</p> <p>11:35am - RIA CEO All Star Panel</p>		<p>11:00am - Chair's Remarks</p> <p>11:05am - The Embedded Wealth Stack and the Opportunities Embedded Finance Brings to Wealth Management</p> <p>11:35am - Where are VCs and PEs Investing in the Next Wave of WealthTech and InvestTech</p>	
12:00PM		<p>12:15pm - InsideETFs Hall of Fame Induction Lunch Reception</p>					<p>12:15pm - Lunch for all Participants</p>				

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WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
Hollywood, Florida

TIME	CONNECTORS	INSIDEETFS	INSIDEETFS ALTERNATIVE TRACK	INSIDEETFS EQUITIES TRACK	INSIDEETFS TRACK	LEADING EDGE STAGE	NETWORKING	RIA EDGE	RIA EDGE WORKSHOP	WEALTHSTACK	WOMEN IN ETFS BREAK-FAST
1:00PM			<p>1:15pm - Allocation Nation: Winning Strategies for Any Portfolio</p> <p>1:55pm - ETFs vs. Direct Indexing: What Does the Future Hold?</p>	<p>1:15pm - Do Alternative Investment Strategies Improve Investor Outcomes?</p> <p>1:55pm - Focusing Capital on the Long Term: The Case for Real Estate</p>	<p>1:15pm - To Outsource or Not to Outsource: That is the Question</p> <p>1:55pm - Uncovering Value with Actively Managed Fixed Income</p>				<p>1:15pm - Valuation & M&A Workshop</p>	<p>1:15pm - The Value of Advice: Articulating and Demonstrating Your True "Alpha" to Clients and Prospects</p> <p>1:55pm - Democratization of Access to the Investment Experience: How Technology is enabling investors to access new markets</p>	
2:00PM			<p>2:35pm - Combining the Benefits of an Active Mutual Fund in 21st Century ETF Wrapper</p>	<p>2:35pm - Commodities in your Portfolio-Risk or Reward?</p>	<p>2:35pm - Regulatory Updates - ETF Changes and Challenges</p>					<p>2:35pm - Tech Stack & Your RIA: From The Lens Of Different Industry Perspectives</p>	
3:00PM	<p>3:15pm - ESG Connector</p>	<p>3:45pm - CIO Perspectives: The Top 3 Risks & Opportunities in 2022</p>				<p>3:15pm - Industry Demos</p>	<p>3:15pm - Afternoon Networking and Refreshment Break</p>		<p>3:45pm - Human Capital, Staffing and Compensation Workshop</p>	<p>3:45pm - CTO Perspectives - Top Tech Trends</p>	

SCHEDULE

WEALTH MANAGEMENT EDGE AGENDA-DAY TWO - 01/06/2022

WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
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TIME	CONNECTORS	INSIDEETFS	INSIDEETFS ALTERNATIVE TRACK	INSIDEETFS EQUITIES TRACK	INSIDEETFS TRACK	LEADING EDGE STAGE	NETWORKING	RIA EDGE	RIA EDGE WORKSHOP	WEALTHSTACK	WOMEN IN ETFS BREAK-FAST
4:00PM		4:25pm - Investing in the Future								4:25pm - The Advisory Firm of the Future: Leading with Technology to Reinvent the Client Experience	
5:00PM	5:05pm - Happy Hour in Exhibit Hall + Demos	5:05pm - Happy Hour in Exhibit Hall + Demos	5:05pm - Happy Hour in Exhibit Hall + Demos	5:05pm - Happy Hour in Exhibit Hall + Demos	5:05pm - Happy Hour in Exhibit Hall + Demos	5:05pm - Happy Hour in Exhibit Hall + Demos	5:05pm - Happy Hour in Exhibit Hall + Demos	5:05pm - Happy Hour in Exhibit Hall + Demos	5:05pm - Happy Hour in Exhibit Hall + Demos	5:05pm - Happy Hour in Exhibit Hall + Demos	5:05pm - Happy Hour in Exhibit Hall + Demos
6:00PM											
7:00PM	7:30pm - Beach Party	7:30pm - Beach Party	7:30pm - Beach Party	7:30pm - Beach Party	7:30pm - Beach Party	7:30pm - Beach Party	7:30pm - Beach Party	7:30pm - Beach Party	7:30pm - Beach Party	7:30pm - Beach Party	7:30pm - Beach Party

SESSIONS

WEALTH MANAGEMENT EDGE AGENDA-DAY THREE - 02/06/2022

WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
Hollywood, Florida

Registration & Breakfast

8:00am - 9:00am

Chair's Remarks

9:00am - 9:05am

Welcome and Opening Address: How to Make Planning More Efficient

9:05am - 9:45am

Understanding Blockchain and Digital Assets

9:45am - 10:25am

Morning Networking and Refreshment Break

10:25am - 10:55am

Chair's Remarks

10:55am - 11:00am
InsideETFs

Chair's Remarks

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

Chair's Remarks

10:55am - 11:00am
WealthStack

The Outlook for the Industry: After a Record Year of Inflows Where Does the Industry Go Next

11:00am - 11:35am
InsideETFs

Organic Growth, Marketing and Business Development Workshop

11:00am - 12:15pm
RIA Edge Workshop

Keynote Address

11:00am - 11:35am
WealthStack

The Truth About ESGs

11:35am - 12:15pm
InsideETFs

Redefining and Reshaping the Client Experience: The Services, Technologies and Solutions that Investors are Demanding from Advisors

11:35am - 12:15pm
WealthStack

Lunch for all Participants

12:15pm - 1:20pm

Cel

1:20pm - 2:00pm

The Evolution of Client Need and Experience

2:00pm - 2:40pm

Afternoon Networking and Refreshment Break

2:40pm - 3:15pm
Networking

Women's Connector

2:40pm - 3:15pm
Connectors

Industry Demos

2:40pm - 3:15pm
Leading EDGE Stage

InsideETFs Visionaries

3:15pm - 3:55pm
InsideETFs

Advanced Financial Planning Workshop

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

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

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

3:55pm - 4:35pm
InsideETFs

Making Connections: How Data Points Can Help You Connect with Clients

3:55pm - 4:35pm
WealthStack

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

4:35pm - 5:15pm
InsideETFs

5 Years of Change in 18 Months: What Have We Learned and What's Ahead?

4:35pm - 5:15pm
WealthStack

Happy Hour in Exhibit Hall

5:15pm - 6:45pm
Networking

Industry Demos

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

Pool Party

8:00pm - 10:00pm

SCHEDULE

WEALTH MANAGEMENT EDGE AGENDA-DAY THREE - 02/06/2022

WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
Hollywood, Florida

TIME	CONNECTORS	INSIDEETFS	LEADING EDGE STAGE	NETWORKING	RIA EDGE WORKSHOP	WEALTHSTACK
8:00AM	8:00am - Registration & Breakfast	8:00am - Registration & Breakfast	8:00am - Registration & Breakfast	8:00am - Registration & Breakfast	8:00am - Registration & Breakfast	8:00am - Registration & Breakfast
9:00AM	9:00am - Chair's Remarks 9:05am - Welcome and Opening Address: How to Make Planning More Efficient 9:45am - Understanding Blockchain and Digital Assets	9:00am - Chair's Remarks 9:05am - Welcome and Opening Address: How to Make Planning More Efficient 9:45am - Understanding Blockchain and Digital Assets	9:00am - Chair's Remarks 9:05am - Welcome and Opening Address: How to Make Planning More Efficient 9:45am - Understanding Blockchain and Digital Assets	9:00am - Chair's Remarks 9:05am - Welcome and Opening Address: How to Make Planning More Efficient 9:45am - Understanding Blockchain and Digital Assets	9:00am - Chair's Remarks 9:05am - Welcome and Opening Address: How to Make Planning More Efficient 9:45am - Understanding Blockchain and Digital Assets	9:00am - Chair's Remarks 9:05am - Welcome and Opening Address: How to Make Planning More Efficient 9:45am - Understanding Blockchain and Digital Assets
10:00AM	10:25am - Morning Networking and Refreshment Break	10:25am - Morning Networking and Refreshment Break 10:55am - Chair's Remarks	10:25am - Morning Networking and Refreshment Break	10:25am - Morning Networking and Refreshment Break	10:25am - Morning Networking and Refreshment Break 10:55am - Chair's Remarks	10:25am - Morning Networking and Refreshment Break 10:55am - Chair's Remarks
11:00AM		11:00am - The Outlook for the Industry: After a Record Year of Inflows Where Does the Industry Go Next 11:35am - The Truth About ESGs			11:00am - Organic Growth, Marketing and Business Development Workshop	11:00am - Keynote Address 11:35am - Redefining and Reshaping the Client Experience: The Services, Technologies and Solutions that Investors are Demanding from Advisors
12:00PM	12:15pm - Lunch for all Participants	12:15pm - Lunch for all Participants	12:15pm - Lunch for all Participants	12:15pm - Lunch for all Participants	12:15pm - Lunch for all Participants	12:15pm - Lunch for all Participants
1:00PM	1:20pm - Cel	1:20pm - Cel	1:20pm - Cel	1:20pm - Cel	1:20pm - Cel	1:20pm - Cel
2:00PM	2:00pm - The Evolution of Client Need and Experience 2:40pm - Women's Connector	2:00pm - The Evolution of Client Need and Experience	2:00pm - The Evolution of Client Need and Experience 2:40pm - Industry Demos	2:00pm - The Evolution of Client Need and Experience 2:40pm - Afternoon Networking and Refreshment Break	2:00pm - The Evolution of Client Need and Experience	2:00pm - The Evolution of Client Need and Experience

SCHEDULE

WEALTH MANAGEMENT EDGE AGENDA-DAY THREE - 02/06/2022

WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
Hollywood, Florida

TIME	CONNECTORS	INSIDEETFS	LEADING EDGE STAGE	NETWORKING	RIA EDGE WORKSHOP	WEALTHSTACK
3:00PM		<p>3:15pm - InsideETFs Visionaries</p> <p>3:55pm - Diversifying from Traditional Asset Classes: Top 5 Crypto/NFT/DeFi Questions</p>			<p>3:15pm - Advanced Financial Planning Workshop</p>	<p>3:15pm - Scale vs. Service: How Technology Can Allow Wealth Managers to Personalize the Delivery of Planning, Investments and "Outcome-Oriented Advice"</p> <p>3:55pm - Making Connections: How Data Points Can Help You Connect with Clients</p>
4:00PM		<p>4:35pm - Why You Need to Know About the Risks, Rewards and Opportunities of Investing in China</p>				<p>4:35pm - 5 Years of Change in 18 Months: What Have We Learned and What's Ahead?</p>
5:00PM			<p>5:15pm - Industry Demos</p>	<p>5:15pm - Happy Hour in Exhibit Hall</p>		
6:00PM						
7:00PM						
8:00PM	<p>8:00pm - Pool Party</p>	<p>8:00pm - Pool Party</p>	<p>8:00pm - Pool Party</p>	<p>8:00pm - Pool Party</p>	<p>8:00pm - Pool Party</p>	<p>8:00pm - Pool Party</p>

SESSIONS

WEALTH MANAGEMENT EDGE AGENDA-DAY FOUR - 03/06/2022

WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
Hollywood, Florida

Registration & Breakfast

8:00am - 9:00am

Welcome and Keynote Address: EDGE Visionary

9:00am - 9:40am

Defining and Designing a Real Financial Wellness Plan

9:40am - 10:20am

Morning Networking and Refreshment Break

10:20am - 10:55am
Networking

Start Up Demos

10:20am - 10:55am
Leading EDGE Stage

Macro Economic Update: What's In Store For 2022

10:55am - 11:35am
InsideETFs

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

11:35am - 12:15pm
WealthStack

Mechanics of Crafting a Financial Succession Plan for a Legacy Firm

12:15pm - 12:55pm
RIA Edge

Conference Concludes

12:55pm - 1:00pm

SCHEDULE

WEALTH MANAGEMENT EDGE AGENDA-DAY FOUR - 03/06/2022

WealthStack

May 31 (Pre-Conference Day) - June 3
The Diplomat Beach Resort
Hollywood, Florida

TIME	INSIDEETFS	LEADING EDGE STAGE	NETWORKING	RIA EDGE	WEALTHSTACK
8:00AM	8:00am - Registration & Breakfast	8:00am - Registration & Breakfast	8:00am - Registration & Breakfast	8:00am - Registration & Breakfast	8:00am - Registration & Breakfast
9:00AM	9:00am - Welcome and Keynote Address: EDGE Visionary 9:40am - Defining and Designing a Real Financial Wellness Plan	9:00am - Welcome and Keynote Address: EDGE Visionary 9:40am - Defining and Designing a Real Financial Wellness Plan	9:00am - Welcome and Keynote Address: EDGE Visionary 9:40am - Defining and Designing a Real Financial Wellness Plan	9:00am - Welcome and Keynote Address: EDGE Visionary 9:40am - Defining and Designing a Real Financial Wellness Plan	9:00am - Welcome and Keynote Address: EDGE Visionary 9:40am - Defining and Designing a Real Financial Wellness Plan
10:00AM	10:55am - Macro Economic Update: What's In Store For 2022	10:20am - Start Up Demos	10:20am - Morning Networking and Refreshment Break		
11:00AM					11:35am - The Convergence of WealthTech and Investment Management: The New "Efficient Frontier"
12:00PM	12:55pm - Conference Concludes	12:55pm - Conference Concludes	12:55pm - Conference Concludes	12:15pm - Mechanics of Crafting a Financial Succession Plan for a Legacy Firm 12:55pm - Conference Concludes	12:55pm - Conference Concludes