AN INDUSTRY IN TRANSITION

In-Person And Virtual Hybrid Summit 2021

EVENT AGENDA

November 17th, 9:00 AM – 5:00 PM ET

8:00 – 9:00	Event opens / Continental Breakfast / Check-in
9:00 – 9:15	Welcome and opening remarks by Tony Sirianni, Publisher & CEO of AdvisorHub
9:15 – 9:45	**Keynote:** Ron Kruszewski, Chairman of the Board of Directors and CEO of Stifel
9:45 – 10:15	**Keynote:** Christine Sandler, Head of Sales and Marketing for Fidelity Digital Assets Chris Baker - Senior Manager, Business Development for Fidelity Digital Assets
10:15 – 10:35	Morning Break
10:35 – 11:35	**PANEL DISCUSSION**: *New Industry Challenges and Opportunities* *Taxes, inflation, regulations, emerging social media investing, Cryptocurrency, online brokerage and the importance of advice.* Moderator: Amit Dogra, Chief Experience Officer, Sanctuary Wealth - Libet Anderson, President - Investment Solutions, Concourse Financial Group - Doug Kentfield - President, and Head of Wealth Management at Steward Partners - Kip Caffey, Chief Executive Officer at Resurgent Financial Advisors LLC - John Tyers, Head of the Independent Advisor Group at First Clearing
11:35 – 12:05	**Keynote:** Tony Rochte, Managing Director, Goldman Sachs Private Bank Select Whit Magruder, Managing Director, Goldman Sachs Private Bank Select
12:05 – 12:20	**HubTalk**: Ron Ransom, Chief Business Development Officer at Envestnet *Being a Student of the Industry*
12:20 – 1:20	Lunch
1:20 – 1:50	**Keynote:** Ed Swenson, Co-Founder and COO of Dynasty Financial Partners & President of Advisor Services Exchange
1:50 – 2:05	**HubTalk:** Trish Moll, Senior Franchise Field Vice President at Ameriprise Financial Brian Mora, Regional Vice President at Ameriprise Financial
2:05 –2:35	**Keynote:** Brian Leitner, Head of Mariner Platform Solution *How to Elevate the Client Experience and Differentiate Your Practice*
2:35 – 2:50	**HubTalk:** Jeff Crosby, CEO & Founder of 3xEquity
2:50 – 3:10	Afternoon Break
3:10 – 4:10	**PANEL DISCUSSION**: *The Covid Effect: Present and Future* *Managing the lingering impacts of the pandemic on technology, real estate and client interaction.* Moderator: Greg Banasz - Managing Director, Founding Partner and Head of Business Development for Steward Partners Global Advisory - Christopher Mone, EVP, Head of Wealth Management at Wedbush Securities - Caitlin Ulmer-Long, Senior Vice President, Director of Private Client Group Administration at Janney - Frank LaRosa – Founder & Chief Executive Officer of Elite Consulting Partners - Jeff Stewart - Managing Director, Head of Business Development at Hilltop Securities Inc. - Gregory J. Troccoli - Senior Vice President, Business Development at B. Riley Wealth Management
4:10 – 4:40	**Keynote:** Kristen Kimmell, EVP, Business Development at Advisor Group, Inc.
4:40 – 4:45	Closing remarks by Tony Sirianni, Publisher & CEO of AdvisorHub