

# HALL OF FAME SUMMIT

October 17-19 2022 | Four Seasons Palm Beach

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## MONDAY, OCTOBER 17, 2022

2:00 PM – 7:15 PM

### REGISTRATION

The Living Room

6:00 PM – 6:45 PM

### COCKTAIL RECEPTION

The Living Room

6:45 PM – 9:00 PM

### WELCOME DINNER & SPEAKER

Royal Poinciana Ballroom

**Spotlight on D.C. Politics: Red or Blue, Will Investors Win?**  
**John Emerson**, Vice Chairman, Capital Group International, Inc.  
Interviewer: **Jack Otter**, Global Head, Barron's Wealth & Asset Management Group

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## TUESDAY, OCTOBER 18, 2022

7:30 AM – 5:15 PM

### REGISTRATION

Royal Poinciana Foyer

8:00 AM – 9:00 AM

### BREAKFAST

Royal Poinciana Ballroom

9:00 AM – 9:30 AM

### GENERAL SESSION

Royal Poinciana Ballroom

**How To Foster the Best Possible Team Synergies**  
**Michael Chasnoff**, Truepoint, Wealth Counsel  
**Kimberlee Orth**, Ameriprise Financial  
**Peter Rohr**, Merrill Lynch Private Wealth Management  
Moderator: **Sue Hadden**, Senior Practice Management Consultant,  
Morgan Stanley Wealth Management

9:30 AM – 9:40 AM

### REFRESHMENT BREAK

Royal Poinciana Foyer

9:40 AM – 10:30 AM

### DISCUSSION GROUPS

Banyan III

**Growth: What does it really mean?**  
**Malcolm Makin**, Raymond James

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Banyan I	<b>RIA Succession Planning</b> David Lees, myCIO Wealth Partners
Banyan I	<b>Seeing Both Sides of Succession</b> Mary Deatherage, Morgan Stanley Private Wealth Management
Banyan II	<b>The Dynamics of a Family Team</b> Michael Sawyer, Morgan Stanley Private Wealth Management
Banyan II	<b>Marketing to the Next Generation</b> Melissa Corrado-Harrison, UBS Financial Services, Inc.
Banyan III	<b>How Philanthropy has Impacted my Success</b> Barbara Hudock, Hudock Capital Group, LLC
Grove	<b>Team Leadership &amp; Development</b> James Stack, Stack Financial Management
Fresco	<b>Reducing Your Number of Clients to Grow</b> Richard Jones, Merrill Lynch Private Wealth Management
<b>10:30 AM – 10:45 AM</b>	<b>REFRESHMENT BREAK</b>
Royal Poinciana Foyer	
<b>10:45 AM – 11:35 AM</b>	<b>GENERAL SESSION</b>
Royal Poinciana Ballroom	<b>Economic &amp; Market Outlook: Finding Clarity Amid Complexity</b> Michael Arone, Chief Investment Strategist, US SPDR Business, State Street Global Advisors
<b>11:35 AM – 12:15 PM</b>	<b>GENERAL SESSION</b>
Royal Poinciana Ballroom	<b>Columbia Threadneedle Investments presents: Live and Lead with an Infinite Mindset</b> Heath Slawner, Optimist Instructor, Simon Sinek, Inc.
<b>12:15 PM – 12:25 PM</b>	<b>REFRESHMENT BREAK</b>
Royal Poinciana Foyer	

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**12:25 PM – 1:25 PM**

The Living Room

## LUNCH

**1:25 PM – 1:40 PM**

Royal Poinciana Foyer

## REFRESHMENT BREAK

**1:40 PM – 2:25 PM**

Royal Poinciana Ballroom

## GENERAL SESSION

**Investing Through Corrections, Inflation & Recessions:  
Exhibits, Illustrations & Ideas to Help Clients Navigate  
Today's Turbulent Market**

**Chris Davis**, Chairman and PM, Davis Funds

**2:25 PM – 3:15 PM**

Royal Poinciana Ballroom

## GENERAL SESSION

**Seven Part Roadmap for Success in Succession**

**Ray Sclafani**, Founder & CEO, ClientWise

**3:15 PM – 3:30 PM**

Royal Poinciana Foyer

## REFRESHMENT BREAK

**3:30 PM – 4:10 PM**

Royal Poinciana Ballroom

## GENERAL SESSION

**Opportunities in the Golden Age of Healthcare Innovation**

**Brian Dausch**, CFA, Portfolio Specialist, U.S. Equity Division, T. Rowe Price

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

**4:10 PM – 5:00 PM**

Royal Poinciana Ballroom

## GENERAL SESSION

**China or the United States: Who Will Write the Rules for the  
21st Century?**

**Matthew Slaughter**, Dean, Tuck School of Business at Dartmouth,  
Former Member of the White House Council of Economic Advisers

Interviewer: **Sam Katzman**, Senior Managing Director, Wealth Manager, First Republic Investment Management

**5:00 PM – 5:45 PM**

Royal Poinciana Foyer

## COCKTAIL RECEPTION

# HALL OF FAME SUMMIT

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7:00 PM – 9:00 PM

## DINE AROUNDS

\*Invitations for Dinner to Follow\*

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## WEDNESDAY, OCTOBER 19, 2022

7:45 AM – 11:00 AM

## REGISTRATION

Royal Poinciana Foyer

8:00 AM – 9:00 AM

## BREAKFAST

Royal Poinciana Foyer

9:00 AM – 9:40 AM

## GENERAL SESSION

Royal Poinciana Ballroom

**Amundi US presents: What are Elite Teams Doing in this New Digital World?**

**Matt Oechsli**, Founder, Oechsli Institute

9:40 AM – 9:55 AM

## REFRESHMENT BREAK

Royal Poinciana Foyer

9:55 AM – 10:35 AM

## GENERAL SESSION

Royal Poinciana Ballroom

**New Word Order: It's Not What You Say, It's What They Hear**  
**Suzette Rothberg**, CFP, Senior Consultant, Invesco Global Consulting

10:35 AM – 11:10 AM

## GENERAL SESSION

Royal Poinciana Ballroom

**Where Top Advisors are Finding Opportunities in a Tough Market**

**Ali Flynn Phillips**, Executive Vice President and Partner, Obermeyer Wood Investment Counsel, LLLP

**Richard Jones**, Merrill Lynch Private Wealth Management

**Brian Pfeifler**, Morgan Stanley Private Wealth Management

Moderator: **Jack Hough**, Associate Editor, Barron's

11:10 AM – 11:50 AM

## GUEST SPEAKER

Royal Poinciana Ballroom

**What Now, Dow? The Outlook for Markets, Rates, and Inflation.**

**Andrew Bary**, Associate Editor, Barron's

**Jack Hough**, Associate Editor, Barron's