

TEAMS SUMMIT

April 27-29, 2022 | Nashville, TN May 3-5, 2022 | Virtual

- Team Leadership
- Business Development
- Advisor & Team Profiles
- Investments
- Relationship Management

WEDNESDAY, APRIL 27, 2022

1:00 PM – 7:00 PM

REGISTRATION

Broadway Prefunction

2:00 PM – 4:00 PM

PRE-CONFERENCE SESSION

Legends Ballroom G

Digital Assets: How to Use This New Asset Class to Gain More Clients and AUM

CFP I-W

Ric Edelman, Founder, Digital Assets Council of Financial Professionals

Legends Ballroom G

The 10 Biggest Questions from Advisors on Bitcoin, Blockchain, and Crypto

CFP I-W

Matt Hougan, CIO, Bitwise

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

5:30 PM – 6:30 PM

WELCOME RECEPTION

Broadway Prefunction

6:30 PM – 8:30 PM

WELCOME DINNER

Broadway Ballroom

Welcome Dinner & Keynote Speaker

Bo Jackson, MLB/NFL Legend and Founder of Bo Bikes Bama

Interviewer: **Matt Barthel**, Executive Editor, Dow Jones Wealth and Asset Management

THURSDAY, APRIL 28, 2022

7:00 AM – 5:00 PM

REGISTRATION

Broadway Prefunction

7:00 AM – 8:00 AM

BREAKFAST

Broadway Prefunction

8:00 AM – 8:50 AM

GENERAL SESSION

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Broadway Ballroom

The Morning News with Barron's

Bill Cass, Director of Wealth Management, Putnam Investments

Leslie Geller, Wealth Strategist, American Funds

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

CFP I-W

8:50 AM – 9:05 AM

REFRESHMENT BREAK

Broadway Prefunction

9:05 AM – 9:55 AM

BREAKOUTS

Legends Ballroom G

- Audience-Led Discussion with The Next Generation of Top Advisors
Speaker TBA

Taylor Barden, Morgan Stanley Wealth Management

James Elliott, Merrill Lynch Wealth Management

Matthew Somberg, Gottfried & Somberg Wealth Management, LLC

Moderator: **Steve Samuels**, Head of Field Engagement and Advisor Recognition, Merrill Lynch Wealth Management

Legends Ballroom C

- Blast Through the Clutter: Use Social Media & Digital Marketing to Stand Out in the "Attention Economy"

Jeff Bradanini, Beirne Wealth Consulting Services

April Rudin, The Rudin Group

Moderator: **Rob Farmer**, Managing Director, Head of Communications, The Rudin Group

Legends Ballroom D

- The Future of Retirement Planning

Kate Beattie, Capital Group

Nihaal Rao, Merrill Lynch Wealth Management

Moderator: **Brian Nicolarsen**, Vice President, Head of Wire and Regional Broker-Dealer Sales, Jackson National Life Distributors LLC

CFP I-W

Cumberland 1 - Level Three

- Teams of the Future: What Will They Look Like and How Should They Be Structured?

Chris Jay, Merrill Lynch Wealth Management

Matthew Van Beek, Merrill Lynch Wealth Management

I-W

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Cumberland 3 - Level Three

- The Ideal Client Service for Today and Tomorrow

Mark Lippman, Wells Fargo Advisors

Liz Weikes, J.P. Morgan Wealth Management

Moderator: **Richard Getzoff**, Head of Eastern Division, Wells Fargo Advisors

9:55 AM – 10:10 AM

REFRESHMENT BREAK

Broadway Prefunction

10:10 AM – 11:00 AM

BREAKOUTS

Legends Ballroom G

- How to Harness Leading Edge Technology to Grow Your Practice

John Valentini, Altfest Personal Wealth Management

Interviewer: **Michael Byrnes**, Owner, Byrnes Consulting

Legends Ballroom C

- 10 Things Elite Advisors Do Best

Shirl Penney, President and CEO, Dynasty Financial Partners

Legends Ballroom D

- Global Commodities: Just Heating Up or Already Cooling Off?

Al Chu, Lead Portfolio Manager on BNY Mellon Natural Resources Fund, Newton Investment Management North America

Interviewer: **Cynthia Chamberlayne**, Senior Vice President, Regional Investment Consultant, BNY Mellon Investment Management

CFP I-W

Cumberland 1 - Level Three

- Path to Partnership: How to Successfully Transition from Employees to Owners

David Armstrong, Monument Wealth Management

Jessica Gibbs, Monument Wealth Management

Cumberland 3 - Level Three

- Lessons Learned for Building and Managing a Successful Team

David Berdon, Morgan Stanley Private Wealth Management

Alexandra Novak, Morgan Stanley Private Wealth Management

Ryan Willsen, Morgan Stanley Private Wealth Management

11:00 AM – 11:15 AM

REFRESHMENT BREAK

Broadway Prefunction

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11:15 AM – 12:00 PM

Broadway Ballroom

GENERAL SESSION

Challenges - and Opportunities - for Teams in an Ever-Changing Landscape

Paul Santucci, Head of Field Development & Productivity, UBS Financial Services, Inc.

Teri Sundberg, Head of Teaming & Practice Management, UBS Financial Services, Inc.

Moderator: **Matt Barthel**, Executive Editor, Dow Jones Wealth and Asset Management

12:00 PM – 1:00 PM

Broadway Ballroom

LUNCH

1:00 PM – 1:50

Broadway Ballroom

GENERAL SESSION

Finding Footing on Unstable Ground: The Value of Scarcity

Matthew McLennan, CFA, Co-Head of the Global Value Team & Portfolio Manager, First Eagle Investments

Moderator: **Joseph Montgomery**, Managing Director-Investments, Wells Fargo Advisors

CFP I-W

1:50 PM – 2:00 PM

Broadway Prefunction

REFRESHMENT BREAK

2:00 PM – 3:55 PM

Cumberland 3 - Level Three

MASTER CLASS

Amplify Your Enterprise Value Through Total Team Leadership™

Ray Sclafani, Founder & CEO, ClientWise

I-W

2:00 PM – 2:50 PM

Legends Ballroom G

BREAKOUTS

- How Elite COOs Can Take Teams to the Next Level

Kenneth Correa, Merrill Lynch Wealth Management

Allison Felix, Cassaday & Company Inc.

Crystal Garrett, Ameriprise Financial

Moderator: **Gerty Simon**, Morgan Stanley Wealth Management

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Legends Ballroom C

- The 5 Secrets of Successful Teams
Beverly Flaxington, Best Selling & Gold-Award Winning Author, The Collaborative

Legends Ballroom D

- Beyond Boomers & Millennials: How One Team Spanning 5 Generations Leaves No Base Uncovered
Hillary Cullen, UBS Financial Services, Inc.
Heather Molin, UBS Financial Services, Inc.

Cumberland 1 - Level Three

- Client Relationship Building and the All Important Human Touch
Miguel Osio, Morgan Stanley Wealth Management
Matt Prucha, Edward Jones
Moderator: **Tim Gerend**, Chief Distribution Officer, Northwestern Mutual

2:50 PM – 3:00 PM

REFRESHMENT BREAK

Broadway Prefunction

3:05 PM – 3:55 PM

BREAKOUTS

Legends Ballroom G

- How to Create "One of the Best Places to Work"
Jim Gold, Steward Partners Global Advisory
Nelrae Pasha Ali, Wells Fargo Advisors
Scott Tiras, Ameriprise Financial
Moderator: **Michael Schweitzer**, Head of HNW Distribution, Capital Group

Legends Ballroom C

- What Are You (Really) Saying? How to Master Your Message and Connect with Your Next Gen Clients & Team
Terri Trespicio, Brand Advisor & Author of Unfollow Your Passion, Terri Trespicio, LLC

I-W

Legends Ballroom D

- Taking Your Team to New Heights: How to Build and Manage an Elite Team
Robert Milliman, First Eagle

Cumberland 1 - Level Three

- Building & Managing a Top Performing Team
Christopher Cobb, Wells Fargo Advisors
Mark Lippman, Wells Fargo Advisors

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3:55 PM – 4:10 PM

REFRESHMENT BREAK

Broadway Prefunction

4:10 PM – 5:00 PM

GENERAL SESSION

Broadway Ballroom

Making Sense of Market and Policy Uncertainty
Andy Blocker, Head of US Government Affairs, Invesco
Brian Levitt, Global Market Strategist, Invesco

CFP I-W

5:00 PM – 6:00 PM

COCKTAIL RECEPTION

Broadway Prefunction

FRIDAY, APRIL 29, 2022

7:00 AM – 11:00 AM

REGISTRATION

Broadway Prefunction

Registration and Information Desk

7:00 AM – 8:00 AM

BREAKFAST

Broadway Prefunction

8:00 AM – 8:50 AM

GENERAL SESSION

Broadway Ballroom

The Emerging Future: Building Future-Ready Organizations and High-Performing Cultures to Compete and Win in The Decade Ahead
Seth Mattison, Founder and CEO, FutureSight Labs

I-W

8:50 AM – 9:05 AM

REFRESHMENT BREAK

Broadway Prefunction

9:05 AM – 9:55 AM

BREAKOUTS

Legends Ballroom G

• How to Ensure Efficiency in Your Practice? Put a Group Director & Head of Business Strategy to Work
Jason Henry, Morgan Stanley Private Wealth Management
Jeffrey Levinsohn, Morgan Stanley Private Wealth Management

I-W

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Legends Ballroom C

- Achieving Success in 'Success'ion Planning
Gary Cooper, UBS Financial Services, Inc.
J Douglas Moran, Merrill Lynch Wealth Management
Moderator: **John Hyland**, Co-Founder and Managing Director, Private Advisor Group

Legends Ballroom D

- Is ESG's Recent Stumble a Blip or Sign of Things to Come?
Kathlyn Collins, Matthews Asia
Christopher Merker, Robert W. Baird & Co.
Vivek Tanneeru, Matthews Asia
Moderator: **Lauren Foster**, Senior Writer, Barron's

CFP I-W

Cumberland 1 - Level Three

- TOP TEAM PROFILE
Jeffrey Bryan, Merrill Lynch Private Wealth Management
Andrew Kraus, Merrill Lynch Private Wealth Management
Robert McGinty, Merrill Lynch Private Wealth Management

9:55 AM – 10:10 AM

REFRESHMENT BREAK

Broadway Prefunction

10:10 AM – 11:00 AM

BREAKOUTS

Legends Ballroom G

- Planning for Success: How to Craft a Top Notch Business & Marketing Plan
Michael Silver, Co-Founder, Focus Partners

Legends Ballroom C

- How We've Created a Horizontal & Team Based Model
Dane Burkholder, Ameriprise Financial Services, Inc.
Michael Hoffman, Ameriprise Financial Services, Inc.
Matthew Wilson, Ameriprise Financial Services, Inc.

Legends Ballroom D

- Adding a Family Member to Your Team Offers High Risk and High Reward
Marybeth Emson, Morgan Stanley Wealth Management
Andrew Minor, Merrill Lynch Wealth Management
Moderator: **Sue Hadden**, Senior Practice Management Consultant, Morgan Stanley Wealth Management

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Cumberland 1 - Level Three Improving Financial Proficiency for the Next Generation
Joe Piombino, Senior Manager, Barron's

11:00 AM – 11:10 AM **REFRESHMENT BREAK**

Broadway Prefunction

11:10 AM – 12:00 PM **GENERAL SESSION**

Broadway Ballroom

Be Happy First: Resilience and Breakthrough Performance in Times of Change
Neil Pasricha, Leadership and Happiness Expert, Founder of the Institute for Global Happiness