

Agenda

NOVEMBER 17, 2020
2:00-3:45 PM

2:00-2:05 PM

WELCOME REMARKS

Sterling Shea, Global Head, Wealth & Asset Management, Barron's Group

Jim Totten, Senior Advisor Consultant, Invesco

2:05-3:40 PM

STUDY GROUP ROUNDTABLE

CFP / I-W

This year's virtual Barron's Atlanta Regional Summit will be formatted as a study group roundtable discussion, where veteran advisors and investment experts will share their insights on many hot-button topics, including how to best cater to clients and grow your business during the COVID-19 pandemic, the current state of the municipal bond market, and the recent US presidential election. Conversation topics will include how to strategize your business plan, team structure, client service, and managing investments in an unpredictable market. This event will also cover concerns on the minds of market participants like tax policy, the potential for a COVID-driven wave of municipal defaults and current investment opportunities in the tax-exempt municipal market.

Andy Blocker, Head of US Government Affairs, Invesco

KT Gallo, Executive Consultant, Invesco

Stephanie Larosiliere, Head of Municipal Business Strategies and Development, Invesco

Leslie Lauer, UBS Private Wealth Management

Wes Moss, Managing Partner and Chief Investment Strategist, Capital Investment Advisors

Rod Westmoreland, Merrill Private Wealth Management

Moderator Sterling Shea, Global Head, Wealth & Asset Management, Barron's Group

3:40-3:45 PM

CLOSING REMARKS

BARRON'S TOP ADVISORS STATE-BY-STATE

Sterling Shea, Global Head, Wealth & Asset Management, Barron's Group