



Agenda

NOVEMBER 19, 2020

2:00-4:00 PM

2:00-2:05 PM

WELCOME REMARKS

Caroline Carley, Senior Advisor Consultant,
Invesco

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

2:05-2:40 PM

BALANCING INCOME, RISK AND UNCERTAINTY WITH MUNICIPAL BONDS

1 credit towards CFP / I-W

With interest rates at historically low levels, investors still have a pressing need to find reasonable income. Invesco's municipal investment leaders will discuss how advisors and investors can use different investment solutions to balance the need for income with the realities of managing risk in an uncertain climate.

Stephanie Larosiliere, Head of Municipal
Business Strategies and Development, Invesco
Mark Paris, CIO, Head of Municipals, Invesco

2:40-3:15 PM

MANAGING YOUR TEAMS, CLIENTS, AND INVESTMENT PROCESS IN THE YEAR TO COME

1 credit towards I-W

In this interactive panel discussion, top advisors will share insights on how they are evolving and adapting their approaches to create better client outcomes and sustained growth in their business. Conversation topics will include how to strategize your business plan, team structure, client service, and investments in an unpredictable market.

Patti Brennan, Key Financial Inc.
Peter Rohr, Merrill Private Wealth Management
Sterling Shea, Global Head, Wealth & Asset
Management, Barron's Group

3:15-3:50 PM

ELECTION 2020: WHAT NOW?

1 credit towards CFP / I-W

As we await the outcome of the 2020 presidential election, advisors and investors are anticipating the results, and worrying about its impact on the market to determine their next move. But what happens after November 3rd? While the election will have a significant impact on the country, we want to provide some caution from drawing too many links between who's occupying the white house and the performance of the stock market. In this session, we will share historical perspectives and data on the impact of politics on investing as well as current developments in the political landscape.

Brian Levitt, Global Market Strategist, Invesco

3:50-4:00 PM

WEALTH TRENDS TO WATCH FOR IN 2021, 2020 BARRON'S TOP ADVISORS STATE-BY-STATE

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