AGENDA | May 3, 2016

7:00 am - 8:00 am
Registration And Breakfast In Exhibit Hall

8:00 am - 8:10 am
Opening Remarks And Welcome

8:10 am - 9:00 am
Disrupting The Status Quo
IMCA CE Credit Approved
What women advisors need to do to have greater influence in the financial advisory profession.
Moderator:
Eleanor Blayney, CFP Board
Speakers:
Jocelyn Wright, State Farm Center for Women and Financial Services, The American College
Melissa Joy, Center for Financial Planning Inc.

9:05 am - 9:55 am
SESSION A
Is Gender Lens Investing Good For Business—And Your Clients?
IMCA and CFP Board CE Credit Approved
Hear the case for gender lens investing—a strategy increasingly used in portfolio building that considers whether companies benefit women and girls by providing capital, leadership opportunities, workplace equity or helpful products and services.
Moderator:
Patricia Farrar-Rivas, Veris Wealth Partners
Speakers:
Gloria Nelund, TriLinc Global
Najada Kumbuli, Calvert Foundation

SESSION B
What Kind Of Business Is Right For You?
IMCA CE Credit Approved
Independent RIA, wirehouse, independent broker-dealer or hybrid? Advisors representing each channel discuss the pros and cons, as well as what women may want to consider when deciding where they want to work or what kind of business they want to own.
Moderator:
Alexandra Lebenthal, Lebenthal Holdings LLC
Speakers:
Diana M. DeCharles, Pinnacle Asset Management Group LLC
Barbara Herman, Diamond Consultants
Stacy Francis, Francis Financial
Suzanne Akian, Morgan Stanley

9:55 am - 10:25 am
Morning Network Break In Exhibit Hall

10:25 am - 11:15 am
SESSION A
The Virtual Game: Using Technology To Improve Your Business—And Your Life
IMCA CE Credit Approved
One advisor has a completely virtual practice, meeting clients around the country by phone, Skype or Google Hangout. Another advisor uses some virtual elements to run her practice more efficiently. Get advice on what you can do to make your practice make the most of technology.
Moderator:
Sheryl Brown, Ash Brokerage
Speakers:
Kevin Knul, PIETech Inc.
Susan Michel, Glen Eagle Advisors

SESSION B
Succession Planning
IMCA CE Credit Approved
Selling a practice to an outside firm or insiders is easier said then done. Panelists discuss why it’s important for every firm to have a succession plan, and the actionable steps you can take to analyze your choices and decide what’s best for you in the long run.
Moderator:
Dorothy Hinchcliff, Financial Advisor Magazine
Speakers:
Laurie Belew, FJY Financial LLC
Marjorie Fox, FJY Financial LLC
Lynn Ballou, EP Wealth Advisors Inc.

11:20 am - 12:10 pm
SESSION A
How To Find A Mentor—And Be One, Too
IMCA CE Credit Approved
Female advisors describe how they found mentors and how you can find one, too. They also describe why it’s important to be a mentor to young advisors and how you can do that without it being too much of a time drain.
Moderator:
Parissa Behnia, 678 Partners
Speakers:
Laura Bley, Bley Investment Group
Christina Ferland, Plante Moran Financial Advisors

12:10 pm - 1:00 pm
Lunch Break In Exhibit Hall

1:00 pm - 1:50 pm
SESSION A
Elevating Women Advisors: Why We Need More Of Them
IMCA CE Credit Approved
New influx of women advisors needs to be addressed. Recognize the benefit and potential of women advisors. Learn how to attract, retain and support women advisors. The panel examines the culture and how to make it better.
Moderator:
Stacy Francis, Francis Financial
Speakers:
Diana DeCharles, Pinnacle Asset Management Group
Melissa Joy, Center for Financial Planning Inc.
Suzanne Akian, Morgan Stanley

1:55 pm - 2:45 pm
SESSION A
What’s Next For Women Advisors? The Key To Success Is Building A Team
IMCA CE Credit Approved
Female advisors speak about the process of building a team, and the different types of teams a female advisor can build. Speakers share their experiences and how they address the unique challenges women advisors face.
Moderator:
Stacy Francis, Francis Financial
Speakers:
Suzanne Akian, Morgan Stanley
Melissa Joy, Center for Financial Planning Inc.

2:50 pm - 3:40 pm
SESSION A
Female Focus: Creating A Landscape For Women Advisors
IMCA CE Credit Approved
Female advisors look at the journey of a woman advising and what advisors should expect. They also discuss the challenges and opportunities advisors face as they grow their businesses.
Moderator:
Suzanne Akian, Morgan Stanley
Speakers:
Stacy Francis, Francis Financial
Melissa Joy, Center for Financial Planning Inc.

3:45 pm - 4:35 pm
SESSION A
Women Advisors: A New Generation Of Leaders
IMCA CE Credit Approved
Women advisors speak about the current generation of women advisors and what they expect the future will look like. This session also features a Q&A with the panelists.
Moderator:
Suzanne Akian, Morgan Stanley
Speakers:
Stacy Francis, Francis Financial
Melissa Joy, Center for Financial Planning Inc.

4:40 pm - 5:30 pm
SESSION A
The Future Of Women Advisors: What Have We Learned?
IMCA CE Credit Approved
Moderator:
Suzanne Akian, Morgan Stanley
Speakers:
Stacy Francis, Francis Financial
Melissa Joy, Center for Financial Planning Inc.
AGENDA | May 3, 2016

11:20 am – 12:10 pm
SESSION B
Beyond The Numbers
IMCA CE Credit Approved
The landscape of the advisory business is changing dramatically. How and what should advisors be doing to convey their true value and increase the stickiness of client relationships? Advisors share information on the importance of a meaningful conversation and will provide you with the tools on how to remain relevant in your clients’ lives.
Speakers:
Catherine M. Seeber, Wescott Financial Advisory Group
Peggy Frye, Glenayr Wealth Advisors LLC

12:10 pm – 2:00 pm
Luncheon
Keynote Address: Laura W. Bush

2:00 pm – 2:35 pm
Dessert Break In Exhibit Hall

2:35 pm – 3:25 pm
Building A Practice
By Embracing The DOL Rule
IMCA CE Credit Approved
Many advisors are worried about how the new DOL rule might impact their practices. Two leading advisors examine how the rule will actually help advisors, in particular women, build the kind of businesses they want to have.
Speakers:
Deena Katz, Texas Tech Univ., Evensky & Katz/Foldes Financial
Patti Houlihan, Houlihan Financial Resource Group

3:30 pm – 4:20 pm
SESSION A
How Philanthropy Changes Relationships With Clients And Employees
CFP Board and IMCA CE Credit Approved
Advisors develop deeper, more meaningful relationships with clients and employees when they are involved in and informed about philanthropic efforts. Hear the stories of advisors who have made these efforts part of their lives and have helped clients explore how to support their communities.
Moderator:
Karla D’Alleva Valas, Fidelity Charitable
Speakers:
Karin Maloney Stifler, Walden Wealth Partners LLC
Kathy Muldoon, Carter Financial Management

SESSION B
Millennial Advisors On The Profession
IMCA CE Credit Approved
Millennial advisors discuss the challenges and opportunities the advisory profession provides for them.
Moderator:
Kate Healy, TD Ameritrade Institutional
Speakers:
Rianka R. Dorsainvil, Your Greatest Contribution
Shovit Kandel, Brennan Financial Services
Dan Duca, Altfest Personal Wealth Mgt.

4:25 pm – 5:15 pm
SESSION A
How Should You Charge Clients?
IMCA CE Credit Approved
Advisors have many options, but few review their pricing model to see if it’s still best. How do you convey your value to clients no matter what pricing model you choose?
Moderator:
John Anderson, SEI Advisor Network
Speakers:
Sheryl Garrett, Garrett Planning Network
Lisa Kirchenbauer, Omega Wealth Management

SESSION B
What You Need To Know About SRI And Impact Investing
IMCA and CFP Board CE Credit Approved
Studies show that women are more interested in sustainable and impact investing than men are. Millennials also have indicated this particular interest. How can you integrate this kind of investing into your practice?
Moderator:
Paul Ellis, Paul Ellis Consulting
Speakers:
Michelle Clayman, New Amsterdam Partners LLC
Erika Karp, Cornerstone Capital Group
Nicole Rothschild, Petra Partners

5:15 pm – 6:30 pm
Cocktail Reception With Exhibitors
AGENDA | May 4, 2016

7:00 am – 8:00 am
Breakfast In Exhibit Hall

8:00 am – 8:10 am
Opening Remarks

8:10 am – 9:00 am
Investing 2016
IMCA and CFP Board CE Credit Approved
How might the outcome of the U.S. Presidential election and global trends affect investment choices for the remainder of this year? What developments should advisors be watching out for to guide their investment strategies?
Moderator: Dorothy Hinchcliff, Financial Advisor Magazine
Speakers: Leah R. Bennett, South Texas Money Mgt.
Susan Hirsch, TIAA

9:05 am – 9:55 am
SESSION A
Creating Long Term Care PLANS
Learn how to address living transitions, financial care taking transitions, health care decision-making transitions, and driving transitions that your clients face.
Speaker: Carolyn McClanahan, M.D., Life Planning Partners

SESSION B
Breadwinning HNW Women
IMCA CE Credit Approved
More women are earning as much or more than their husbands. How are their needs different from those of traditional female clients? How should you market to them?
Moderator: Sharon Allen, Sterling Wealth Management
Speakers: Rebecca Ross, Robert W. Baird & Company
Chuck Bowes, Waypoint Wealth Partners

10:00 am – 10:50 am
SESSION A
Social Security Choices For Women
IMCA and CFP Board CE Credit Approved
When should women collect Social Security? What strategies might result in higher benefits?
Speakers: Sabrina Lowell, Mosaic Financial Partners Inc.
Amanda Lott, Stratford Consulting

SESSION B
Divorce Planning As A Specialty
IMCA and CFP Board CE Credit Approved
Many advisors have focused on the niche of individuals getting divorced. What must you consider if you want to focus on this group of potential clients?
Moderator: Kimberly Foss, Empyrion Wealth Management Inc.
Speakers: Bonnie Sewell, American Capital Planning LLC
Evelyn M. Zohlen, Inspired Financial

10:50 am – 11:20 am
Morning Network Coffee Break In Exhibit Hall

11:20 am – 12:10 pm
SESSION A
How You Can Use Robo-Advisors To Attract Female Clients
IMCA CE Credit Approved
Major financial services firms are now offering robo-advisors that are supposed to also help advisors serve their clients. How can these robo-advisors help you?
Moderator: Evan Simonoff, Financial Advisor Magazine
Speakers: Cheryl Nash, Fiserv Inc.
Lori Hardwick, Pershing LLC, a BNY Mellon company

SESSION B
How Advisors Can Help Women With Critical Estate Issues
IMCA and CFP Board CE Credit Approved
How can women financially provide for their children after they die? How can they ensure their own health-care wishes are followed? Our panel of experts discusses what questions financial advisors should ask their clients on these and other topics related to estate planning, as well as what strategies make sense under various circumstances.
Moderator: Holly Isdale, Wealthaven
Speakers: Debra Smietanski, Foley & Lardner LLP
Debra L. Morrison, Empowered Retirement Inc.

12:15 pm – 1:25 pm
Luncheon
Keynote Address: Alicia Munnell

1:25 pm – 1:45 pm
Dessert Break In Exhibit Hall

1:45 pm - 2:45 pm
Keynote Address: Kevin O’Leary

2:45 pm
Conference Adjourns