Invest In Women 2017 Conference

AGENDA | **May 9, 2017**

7:15 am - 8:00 am
Registration And Breakfast In Exhibit Hall

8:00 am - 8:10 am
Opening Remarks And Welcome
David Smith & Dorothy Hinchcliff
Financial Advisor Magazine

8:10 am - 9:10 am
General Session:
Building A Successful Advisory Practice
IMCA CE Credit Approved Only - 1.0 hour
Female advisors who have built big businesses outline the steps that got them there.
Moderator:
Sheryl Garrett, Garrett Planning Network
Speakers:
Lynn Ballou, EP Wealth Advisors Inc.
Melissa Joy, Center for Financial Planning

9:15 am - 10:05 am
Session A
Attracting Women To The Advisory Business
IMCA CE Credit Approved Only - 1.0 hour
Do female advisors offer a competitive advantage in an advisory business? How do we close the gap between the number of men and women? What kinds of strategies have been successful at recruiting and retaining women financial advisors? Dimensional Fund Advisors has engaged with a community of leading independent advisors to discuss this important topic and leads an advisor panel to review their efforts, observations and key takeaways.
Moderators:
Iwona Hill, Dimensional Fund Advisors
Kahne Krause, Dimensional Fund Advisors
Speakers:
Gretchen Halpin, Hewins Financial | Wipfli Hewins
Rachel Robasciotti, Robasciotti & Philipson
Manisha Thakor, The BAM ALLIANCE

Session B
The Advantages Of Using Technology To Market Your Firm
IMCA CE Credit Approved Only - 1.0 hour
Technology options may seem endless, but focusing on smart choices can help you build your practice. Hear about the options available and what they can do to help you stand out.
Moderator:
Nikolee Turner, Charles Schwab & Co. Inc.
Speakers:
Diana DeCharles, Pinnacle Asset Mgt.
Hannah Moore, Guiding Wealth Management
Ann Benjamin Zuraw, Zuraw Financial Advisors LLC

10:05 am - 10:40 am
Morning Network Break In Exhibit Hall

10:40 am - 11:30 am
Session A
Cracking Open The Philanthropic Conversation—Your Business Depends On It!
CFP Board and IMCA CE Credit Approved - 1.0 hour each
Philanthropic planning is an essential step for advisors in preparing clients for success, deepening client relationships and positioning our practices to support future generations. However, too few advisors are taking hold of this important opportunity. A multi-disciplinary team explores effective practices for cracking open the philanthropic conversation and engaging in this integral piece of the financial and legal puzzle for HNW clients. In this interactive session, learn about practical tools to integrate into your practice and build upon your understanding of why clients' values and philanthropy should matter to you.
Moderator:
Betsy Brill, Strategic Philanthropy, Ltd.
Speakers:
Clare Golla, Bernstein Private Wealth Mgt.
Karen Meckstroth, Hoge Fenton Jones & Appel

Session B
Transitioning Your Practice To Your Children
IMCA CE Credit Approved - 1.0 hour
It sounds like the perfect solution—sell your practice to your child. But it's not as simple as it sounds; advisors talk about the challenges they faced in making the transition.
Moderator:
Debra Brennan Tagg, Brennan Financial Services
Speakers:
Lauren Lindsay, Personal Financial Advisors LLC
Susan Michel, Glen Eagle Advisors

11:35 am - 12:25 pm

Session A

Longevity Planning For Female Clients

CFP Board and IMCA CE
Credit Approved - 1.0 hour each

Panelists discuss important topics to cover and revisit with every female client to ensure they provide a holistic approach that addresses retirement, security and happiness.

Moderators:
Dorothy Hinchcliff, *Financial Advisor* Magazine

Speakers:
Shawn Britt, Nationwide Insurance
Jeanie Walls Knigin, Morgan Stanley
Sybil Praski, The Williams Group

Session B

How To Maintain HNW Relationships From One Generation To Another

CFP Board and IMCA CE
Credit Approved - 1.0 hour each

Keeping your clients from one generation to the next is a huge challenge. What steps should you take to ensure the relationship continues? Hear from our experts on what they've done to foster continuing relationships and how you can use such techniques in your own practice.

Speakers:
Debra L. Morrison, Empowered Retirement Inc.
Catherine Seeber, CAPTRUST

12:25 pm - 1:40 pm

Luncheon

Keynote Address: **Jean Chatzky**

Beyond Investing: Financial Wellness

1:40 pm - 2:20 pm

Dessert Break In Exhibit Hall

2:20 pm - 3:10 pm

Session A

Using Impact Investing To Attract High-Net-Worth Clients

CFP Board and IMCA CE
Credit Approved - 1.0 hour each

More clients, particularly millennials, want their values reflected in how they invest. Learn how you can target high-net-worth clients with a strategic impact investing focus.

Moderator:
Paul Ellis, Paul Ellis Consulting

Speakers:
Eve Ellis, The Matterhorn Group at Morgan Stanley
Kelly Coyne, Pax World
Barbara Krumseik, Arabesque Asset Mgt.

Session B

So You Want To Write A Book?

IMCA CE Credit Approved - 1 hour

A book about your investment approach, your planning focus or even your own life can be an excellent tool for attracting new clients. Learn how to decide on a focus, how to get the writing done and how to get your book produced and distributed.

Moderator:
Kimberly Foss, Empyrion Wealth Mgt.

Speakers:
Larry Mathis, Mathis Wealth Management
Bonnie Sewell, American Capital Planning LLC

3:15 pm - 4:05 pm

Session A

Finding Your Niche

IMCA CE Credit Approved - 1 hour

What is important to consider when finding a focus for your practice? Successful advisors discuss how and why they chose their specialty, and the lessons they learned in the process.

Moderator:
Evan Simonoff, *Financial Advisor* Magazine

Speakers:
Rianka Dorsainvil, Your Greatest Contribution
Jane Newton, RegentAtlantic

Session B

Serving High-Net-Worth LGBTQA Clients

CFP Board and IMCA CE
Credit Approved - 1.0 hour each

Focusing on high-net-worth individuals in this community can be a rewarding specialty. Hear from experts who have made it the focus of their practices.

Moderator:
Dorothy Hinchcliff, *Financial Advisor* Magazine

Speakers:
Catherine Burgess, Wells Fargo Advisors
Marlo Stil, The Wealth Consulting Group
Anne Warren, Brown Brothers Harriman

Session C

When Liquid Alternatives Make Sense For HNW Women

CFP Board and IMCA CE Credit Approved - 1.0 hour each

Astute, wealthy clients may be looking for more from you than a plain vanilla portfolio. Learn when liquid alternatives have performed best in portfolios, and why current markets make now an ideal time to consider these noncorrelated investments for your clients.

Moderator:
Eileen Duff, iCapital Network
Speakers:
Shannon M. Ericson, LMCG Investments
Janielle Lucas, Balter Liquid Alternatives

4:10 pm - 5:00 pm

Session A

Finding And Attracting High-Net-Worth Female Clients

IMCA CE Credit Approved - 1.0 hour

Can an advisor build a practice focused on women of means, no matter what the client's background? Advisors talk about the value you can bring to female breadwinners, stay-at-home moms and inheritors.

Moderator:
Sharon Allen, Sterling Wealth Management
Speakers:
Nina Mitchell, Bridgewater Wealth & Financial Management LLC
Adrienne Penta, Brown Brothers Harriman
Center for Women & Wealth

Session B

How Hiring Millennials Can Boost Your Business

IMCA CE Credit Approved - 1.0 hour

Learn how to hire younger advisors and how this can help boost your firm's growth.

Moderator:
Kate Healy, TD Ameritrade Institutional
Speakers:
Deena Katz, Texas Tech University; Evensky & Katz/Foldes Financial Wealth Management
Cheryl Nash, FiServ
Courtnie Nien, Good Life Advisors

5:00 pm - 6:15 pm

Sponsored Cocktail Reception With Exhibitors

AGENDA | **May 10, 2017**

5:30 am - 7:00 am

Save The Children Downtown Dallas Run

7:15 am - 8:00 am

Breakfast In Exhibit Hall

7:30 am - 8:05 am

Stress Testing Your Financial Planning Process: Why the Human Touch Matters

Pending CE Credit Approval

As an advisor, you want to render the best advice possible. Have you considered how your client's stress level can vary depending on whether she meets with you in-person or virtually and how you can impact it? Learn about groundbreaking biometric research that will challenge the way you think about client interaction and will help illustrate the substantial need for human advisors in the financial advice and planning process. The session will include findings on how gender and age drive a different level of stress during the planning process and five things advisors can do to change the client planning experience that will create growth opportunities and more loyal clients.

Speaker:
Ryan Sullivan, PIEtech

8:05 am - 8:10 am

Opening Remarks

David Smith & Dorothy Hinchcliff
Financial Advisor Magazine

8:10 am - 9:00 am

General Session:

Investing Under President Trump

CFP Board and IMCA CE Credit Approved - 1.0 hour each

What have the first 100 days told us about the new president's priorities and how might this affect investing choices? Investment managers discuss what they are watching for and whether they've adjusted allocations as a result of the new administration.

Moderator:
Leah Bennett, Westwood Trust
Speakers:
Kathleen Gaffney, Eaton Vance
Lori A. Keith, Parnassus Investments
David Winters, Wintergreen Advisers LLC

9:05 am - 9:55 am
Session A
The Modern Family Office
IMCA CE Credit Approved - 1.0 hour
The services that leading family offices offer have changed dramatically. Before discussing solutions, advisors must talk about goals. The result could be that an advisor becomes a family's outsourced CIO, helping them invest in line with their values or providing a plan on how philanthropy will help them strengthen connections among family members. Learn from two leading multifamily office advisors how serving the very wealthy has changed.
Moderator:
Evan Simonoff, *Financial Advisor* Magazine
Speakers:
Dr. Lisette Cooper, Athena Capital Advisors
Whitney Kenter, Matter Family Office

Session B
Women And Social Security
CFP Board and IMCA CE Credit Approved - 1.0 hour each
J.P. Morgan Asset Management's chief retirement strategist discusses the critical importance of Social Security to the retirement income security of women, as well as proposed changes that should be on the radar of every advisor.
Speaker:
S. Katherine Roy, J.P. Morgan Asset Management

9:55 am - 10:30 am
Morning Network Coffee Break In Exhibit Hall

10:30 am - 11:20 am
Session A
Does Your Firm Need A Women's Initiative?
CFP Board and IMCA CE Credit Approved - 1.0 hour each
The percentage of CFP advisors who are women is still under 25 percent. Most female clients leave their advisors after their husbands die. Does a firm with a women's initiative make a difference in these numbers? Panelists discuss how they launched successful efforts and the difference those initiatives have made.
Moderator:
Jocelyn Wright, The American College
Speakers:
Sara Gelsheimer, Plancorp LLC
Michelle Lynch, Raymond James Network for Women Advisors
Lorraine R. Salvo, Massey Quick Wealth Management

Session B
How To Use Dignity And Grace To Discuss Cognitive Decline
CFP Board and IMCA CE Credit Approved - 1.0 hour each
Advisors can help protect clients and deepen relationships if they take the right approach to discussing the risk of cognitive decline comes with aging. Hear from experts on how to approach the topic so that clients don't feel threatened, yet are willing to implement precautions.
Speaker:
Brie Williams, State Street Global Advisors

11:25 am - 12:15 pm
Session A
The Financial Advisor Of the Future
IMCA CE Credit Approved - 1.0 hour
Dr. Carolyn McClanahan, CFP, founder of Life Planning Partners, has built a practice that is not based on commissions or AUM fees, yet has a yearlong waiting list of clients. Learn what she's done to build a highly successful retainer-based practice that focuses on millionaire-next-door clients.
Speaker:
Carolyn McClanahan, M.D., CFP, Life Planning Partners Inc.

12:15 pm - 1:25 pm
Luncheon
Keynote Address: **Elizabeth Smart**
Overcoming Adversity: The Elizabeth Smart Story

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

1:50 pm - 2:40 pm
CFP Board and IMCA CE Credit Approved - 1.0 hour each
A Conversation With:
Carrie Schwab-Pomerantz

2:45 pm - 3:35 pm
Hot Topics In Health Care
CFP Board and IMCA CE Credit Approved - 1.0 hour each
Health-care issues are paramount to many clients, especially given the promised health insurance upheaval from the Trump administration. Two experts discuss what you should look out for on behalf of your clients and your businesses.
Moderator:
Christopher Robbins, *Financial Advisor* Magazine
Speakers:
Chris Cooper, Eldercare Associates
Katy Votava, Goodcare.com

3:40 pm - 5:00 pm
The Era Of The High-Performance Financial Planner

Who better than Bill Bachrach, creator of the Values-Based Financial Planning business model and trainer/coach to many of top advisors in the Financial Services Institute, to help you grow your business and elevate your client value? They will provide a roadmap for reinventing your business by charging upfront financial planning fees, converting prospects into clients, and getting existing clients to consolidate their money and financial services business with one advisor—you.

Speaker:
Bill Bachrach, Bachrach & Associates

5:00 pm
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