4TH ANNUAL

INVEST IN WOMEN Conference Agenda

April 30, 2018

8:30 am – 6:00 pm

All Day Registration

8:30 am – 9:00 am

Pre-Conference Workshop Registration

9:00 am – 12:00 pm

3.5 Hours/CFP Board and I&WI CE Credits

PRE-CONFERENCE WORKSHOP • Ballroom of the Americas F

Susan Bradley, *Sudden Money Institute*

Widowhood: When Two Becomes One

A primary reason couples hire and stay with a financial advisor is to be sure you will be there when the unthinkable, yet inevitable, happens as one spouse dies, leaving the surviving spouse alone to pick up the pieces and learn to live as one. To keep these valuable clients, advisors must learn how to work with widows on communication, decision-making and expectations. This workshop covers the time-tested tools and process advisors can use to meet each widow where they are, guide them at their own pace and gradually help them recover their capabilities to rebuild their life.

1:00 pm – 1:05 pm

Opening Remarks And Welcome

1:05 pm – 1:35 pm

KEYNOTE ADDRESS • Ballroom of the Americas A-C

Theresa Gusman, *First Affirmative Financial Network*

The Future Of Impact: What Every Investor Needs To Know

Study after study has shown that the number of people who want to take responsibility for the impact their money has in the world has been growing exponentially. Women and millennials in particular want to invest in companies that contribute to a clean, healthy environment, treat people fairly, embrace equal opportunity, produce safe and useful products, and support efforts to promote a more peaceful world. There is also growing recognition investment performance and impact performance are not mutually exclusive. 2018 will be a watershed year for sustainable, responsible and impact (SRI) investing. Every advisor—particularly those with female clients—should understand SRI investing and present it as an option to clients.

1:40 pm - 2:30 pm

SESSION A • Ballroom of the Americas D

1 Hour/CFP Board and I&WI CE Credits

Building A Client Base Interested In Impact/ESG Investing

Women and millennials are more interested in impact/ESG investing than the typical investor. How do you explain and market these ideas to potential clients and existing ones? What kind of activities and events might attract clients interested in ESG/impact?

MODERATOR: Marlo Stil, The Wealth Consulting Group

SPEAKERS: Kelly Coyne, Pax Ellevate Management & Impax Asset Mgmt
Jeff Gitterman, Gitterman Wealth Management

1:40 pm - 2:30 pm

SESSION B • Ballroom of the Americas E

1 Hour/CFP Board and I&WI CE Credits

Investing For Gender And Equality

Many Impact/ESG managers consider how companies work with and benefit women before deciding whether to invest in them. What returns can clients expect from gender-lens investments? Does having more women on corporate boards improve company stock performance? Does helping poor women start businesses lead to any returns for investors?

MODERATOR: Kristin Jenko, Boston Common Asset Management

SPEAKERS: Kalita Blessing, Quest Capital Management
Kristin Hull, Nia Global Solutions

2:30 pm – 3:10 pm

Networking Refreshment Break In Exhibit Hall

3:10 pm - 4:00 pm

SESSION A • Ballroom of the Americas D

1 Hour/CFP Board and I&WI CE Credits

Best Tools For Evaluating Impact/ESG Investments

The number of impact/ESG investment strategies has exploded, but how do you compare one to another? How can you tell if these investments are positioned to live up to their promises? Our panel discusses the pros and cons of the many tools available to help you evaluate myriad choices and build values-based portfolios for all of your clients—women, men and millennials.

MODERATOR: Paul Ellis, Paul Ellis Consulting

SPEAKERS: Sarah Greenberg, MSCI
Christopher L. Knapp, Collaboration Capital
Dr. Dinah A. Koehler, UBS Asset Management

SESSION B • Ballroom of the Americas E

1 Hour/CFP Board and I&WI CE Credits

Advising Wealthy Families On Impact/ESG Investing

More very wealthy families are interested in “making an impact” with their investments. Scott Schwinger, CFO of the Houston Texans and CEO of The McNair Group, shares what kinds of impact investments these organizations have chosen, what information is important to their decision-making and how they work with advisors to implement family goals.

MODERATOR: Leah Bennett, Westwood Trust—Houston

SPEAKER: Scott Schwinger, The McNair Group

4:05 pm - 5:00 pm

1 Hour/I&WI CE Credits

KEYNOTE ADDRESS • Ballroom of the Americas A-C

Jerry Greenfield, *Ben and Jerry’s Homemade Inc.*

Entrepreneurial Spirit, Social Responsibility And Business

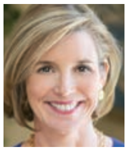
5:00 pm – 6:00 pm

Ben & Jerry’s Ice Cream and Cocktail Pairing Reception With Exhibitors

May 1, 2018

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

8:00 am - 8:10 am
Opening Remarks • Ballroom of the Americas A-C



8:10 am - 9:10 am
1 Hour/CFP Board and I&WI CE Credits
KEYNOTE ADDRESS • Ballroom of the Americas A-C
Sallie Krawcheck, *Ellevate Network*
Why Gender-Neutral Investing Fails Women
"Women don't want to invest." We heard it over and over again, and it couldn't be more wrong. When the investment industry defaults to men's salaries, career paths, preferences and life spans, women are underprepared to face the challenges that face them: career breaks, unpaid maternity leave, longer life spans, the gender pay gap. The list goes on. Women need to take control of their financial futures.

9:15 am - 10:05 am
SESSION A • Ballroom of the Americas D
1 Hour/I&WI CE Credits
Building A Women's Initiative At Your Firm
Forward-thinking advisory firms realize the need to attract women as advisors and clients. But putting ideas into practice requires vision, planning and commitment. Leading advisors and industry advocates discuss what steps have proven most successful and how those steps affected outcomes in results-producing initiatives.
MODERATORS: **Iwona Cholewa**, Dimensional Fund Advisors
Kahne Krause, Dimensional Fund Advisors
SPEAKERS: **Kate Healy**, TD Ameritrade
Neela Hummel, Abacus Wealth Partners
Eileen O'Connor, Hemington Wealth Management

SESSION B • Ballroom of the Americas E
1 Hour/CFP Board and I&WI CE Credits
Young Advisors: Their Vision For The Profession
Younger advisors describe how they are building their practices and how they are serving millennial clients. They share the insight that's valuable to millennials and what they've learned that may benefit advisors with decades of experience.
MODERATOR: **Winnie Sun**, Sun Group Wealth Partners
SPEAKERS: **Helen Ngo**, Capital Benchmark Partners
Heather Townsend, Townsend Financial

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

10:40 am - 11:30 pm
SESSION A • Ballroom of the Americas D
1 Hour/CFP Board and I&WI CE Credits
Sophisticated Strategies For Your High-Net-Worth And Ultra-High-Net-Worth Clients
HNW and UHNW clients often have situations or needs that require a solution set providing a higher level of customization. Typical asset allocations focus on traditional stocks, bonds and cash; how can you better assist in achieving your clients' financial goals that in today's world may require greater or more innovative diversification? What kind of products, expertise and specialists can help you define the best solution for your clients?
MODERATOR: **Barbara Mullaney**, Citi Private Client Solutions
SPEAKERS: **Jean Duffy**, CAPTRUST
Jeanie Walls Knigin, Morgan Stanley

SESSION B • Ballroom of the Americas E
1 Hour/CFP Board and I&WI CE Credits
10 Things Not To Miss In HNW Charitable Planning
Women are the new decision-makers when it comes to substantial charitable giving. How do you tee up the conversation and effectively engage clients on this important topic? Speakers will explain how to build a team that addresses due diligence, estate planning, tax and other considerations. They will also provide an overview of which philanthropic tools will best help you serve client needs.
MODERATOR: **Betsy Brill**, Strategic Philanthropy
SPEAKERS: **Laura Malone**, American Endowment Foundation
Jennifer Klein Strauss, Ytterberg Deery Knull

11:35 am - 12:25 pm
SESSION A • Ballroom of the Americas D
1 Hour/I&WI CE Credits
Digital Advice Platforms: Using Them To Build Your Business
How financial advice is provided is changing. Learn how to make the most
of new tools that offer advantages in serving and attracting clients.
MODERATOR: **Kimberly Foss**, Empyrion Wealth Management
SPEAKERS: **Carol Ann Michel**, Glen Eagle Advisors
Erin Durkin Voisin, EP Wealth Advisors

SESSION B • Ballroom of the Americas E
1 Hour/I&WI CE Credits
Break-ups And Breakaways In The Financial Advisory Business: What Makes It So Difficult?
Switching firms can be extremely difficult in the financial advisory industry. Why is that and why isn't anyone talking about it? Advisors who want to transition to a different firm face emotional strains of having to "leave" their clients and may potentially face legal battles. Yet changing firms can be in the best interest of both the advisor AND the client. Advisors and other experts discuss their firsthand experiences with these challenges.
MODERATOR: **Catherine Seeber**, CAPTRUST
SPEAKERS: **Rick Adkins**, Arkansas Financial Group
Linda Willis, Career Management Advisors

12:25 pm - 1:40 pm

Luncheon

KEYNOTE ADDRESS • Ballroom of the Americas A-C

Valerie Plame

Fair Game: My Life As A Spy, My Betrayal By The White House

1:40 pm - 2:20 pm

Dessert Break In Exhibit Hall

2:20 pm - 3:10 pm

SESSION A • Ballroom of the Americas D

Getting ROI From Social Media

Even advisors adhering to compliance concerns can use social media creatively to build their businesses and stay connected with their clients. Hear leading experts and advisors describe how they use social media in exciting and effective ways without letting it drain time from their primary business activities.

MODERATOR: **Sheryl Brown**, Sigma Financial Corp. and Parkland Securities

SPEAKERS: **Katie Brewer**, Your Richest Life
Marguerita M. Cheng, Blue Ocean Global Wealth
Rianka Dorsainvil, Your Greatest Contribution

SESSION B • Ballroom of the Americas E

1 Hour/CFP Board and I&WI CE Credits

Five Big Threats To Women's Retirement Security

Panelists provide advice on what advisors should consider in dealing with these major issues and how to minimize the impact for your clients.

MODERATOR: **Evan Simonoff**, *Financial Advisor* magazine

SPEAKERS: **Lorraine Ell**, Better Money Decisions
Abigail Gunderson, Tanglewood Total Wealth Management
Lizzie Dipp Metzger, Crown Wealth Strategies

3:15 pm - 4:05 pm

SESSION A • Ballroom of the Americas D

1 Hour/CFP Board and I&WI CE Credits

Financial Transition Planning: The Future Of The Profession

The stunning reality is that 70 percent of clients hire an advisor because of life transition events, and that should make even the most confident advisors pause. Every advisor needs to be able to skillfully handle clients when they are emotional, irrational, unable to articulate their own core values, and in need of someone who truly understands where they are in their life and what they are going through. This session uses real financial transition planning client cases to show the profound results planners can achieve by learning a new way of doing as well as a new way of being as a financial advisor.

SPEAKERS: **Susan Bradley**, Sudden Money Institute
Peggy Frye, Glenayr Wealth Advisors

SESSION B • Ballroom of the Americas E

1 Hour/CFP Board and I&WI CE Credits

Helping HNW Clients To The Divorce Finish Line And Beyond

Seasoned advisors discuss how to build a financial planning practice focused on divorce from the ground up. Learn about major divorce issues that clients face and how advisors help clients address them, as well as the most effective ways to build referrals.

MODERATOR: **Pam Friedman**, Silicon Hills Wealth Management

SPEAKERS: **Denise French**, Divorce Strategies Group
Lynne Knox, Capital Group Private Client Services

4:10 – 5:00 pm

KEYNOTE ADDRESS • Ballroom of the Americas A-C

Dr. Sherise Ferguson, *MD Anderson Cancer Center*

Brain Tumors, The Road Ahead

A leading neurosurgeon from MD Anderson, one of the top cancer-treatment centers in the world, will discuss ground-breaking research on the most common forms of brain tumors, which are sure to affect some of your clients. She'll also shed light on the kind of primary brain cancer that hit Senator John McCain and former Senator Ted Kennedy.

5:00 pm - 6:00 pm

Cocktail Reception With Exhibitors

May 2, 2018

7:15 am - 8:00 am

Breakfast In Exhibit Hall

8:00 am - 8:10 am

Opening Remarks • Ballroom of the Americas A-C

8:10 am - 9:00 am

1 Hour/CFP Board and I&WI CE Credits

GENERAL SESSION • Ballroom of the Americas A-C

Investing In Turbulent Times

MODERATOR: **Dorothy Hinchcliff**, *Financial Advisor* magazine

SPEAKERS: **Lori A. Keith**, Parnassus Investments
Lauren Taylor Wolfe, Impactive Capital

9:05 am - 9:55 am

SESSION A • Ballroom of the Americas D

Work/Life Balance For Advisors

How do you live a fulfilling work and personal life as a financial advisor? Hear what some firms are doing to help you work smarter and still have time for family and other interests.

MODERATOR: **Melissa Joy**, Center for Financial Planning

SPEAKERS: **Sheila Bonitz**, Brinker Capital
Courtnie Nein, Good Life Financial Advisors

SESSION B • Ballroom of the Americas E

1 Hour/CFP Board CE Credits

The Advancement Challenge

How do you get to the next level at your firm? Whether you own a firm or work at one, achieving your aspirational goals takes thought, planning and action. Get insight from two leading business coaches who work specifically with advisors on the steps you can take to get where you want to be.

MODERATOR: **Karen DeMasters**, *Financial Advisor* magazine

SPEAKERS: **Susan Danzig**, Susan Danzig
Barbara Stewart, Accelus Partners

9:55 am - 10:30 am

Morning Network Coffee Break In Exhibit Hall

10:30 am - 11:20 am

1 Hour/CFP Board and I&WI CE Credits

KEYNOTE ADDRESS • Ballroom of the Americas A-C

Philip C. Marshall, *Beyond Brooke—Advancing Elder Justice*

Fighting The Elder Abuse Crisis Through Financial Wellness

Philip C. Marshall testified against his father to protect his grandmother—New York philanthropist and socialite Brooke Astor—in one of the most well-known court cases involving elder financial abuse in U.S. history. Ever since, Marshall has been at the forefront of a movement to protect older individuals from financial exploitation that often happens as their cognitive abilities diminish or they face undue influence from friends, relatives or caretakers. Hear what financial advisors can do to protect their clients, as well as their own friends and family members, from abuse and anguish caused by such crimes.

11:25 am - 12:15 pm

SESSION A • Ballroom of the Americas D

1 Hour/CFP Board and I&WI CE Credits

Why Goals-Based Planning Works For Female Clients In Particular

Women often think about the long term: what they want in life for their families and themselves. Goals-based planning discussions show clients that you care about their dreams and will help them build wealth to achieve them.

MODERATOR: Sharon Allen, Sterling Wealth Management

SPEAKERS: Marguerita M. Cheng, Blue Ocean Global Wealth
Ann Senne, RBC Wealth Management

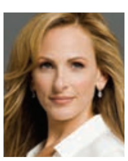
SESSION B • Ballroom of the Americas E

Meeting The Challenges Of Recruiting Women Advisors

What will help attract more women to the profession? Many people have been working hard to change the status quo, but progress isn't as fast as some would like. Hear ideas on how to make progress.

MODERATOR: Dorothy Hinchcliff, *Financial Advisor* magazine

SPEAKERS: Eleanor Blayney, CFP Board Women's Initiative
Sarah Boston, Raymond James Network of Women Advisors
Clarissa R. Hobson, Carnick & Kubik



12:15 pm - 1:25 pm

Luncheon

KEYNOTE ADDRESS • Ballroom of the Americas A-C

Marlee Matlin

A Conversation: From Oscar To West Wing And Beyond

1:25 pm - 1:45 pm

Dessert Break In Exhibit Hall

1:50 pm - 2:40 pm

SESSION A • Ballroom of the Americas D

Beyond Investment Management: Other Services For HNW Clients

What advice components will bring in the kinds of clients you want? Should you offer or partner with a college planner? A life coach? A therapist? An estate attorney? A career counselor? A senior housing expert? An insurance specialist?

MODERATOR: Robert Laura, Synergos Financial Group

SPEAKERS: Joni Lindquist, KHC Wealth Management
Sybil Praski, The Williams Group
Laura Tarbox, Tarbox Family Office

SESSION B • Ballroom of the Americas E

1 Hour/CFP Board and I&WI CE Credits

Longevity Lifestyle Preparation: What Women Need to Know

We are living longer and spending more time in retirement than ever before. We will explore how long your clients might live including data on the longer life expectancies for female clients. As an advisor, you have the opportunity to help your clients prepare for the lifestyle they imagine during these additional years. Great-West Financial is collaborating with the Stanford Center on Longevity to bring you research and data on how to incorporate longevity planning into your practice. Specifically, we will present the three tenets of long life—mind, mobility and money—with an emphasis on why these topics are especially important to women advisors and clients. Finally, we will end with how retirement income strategies can fit into your clients' portfolios.

SPEAKER: Barbara Dare, Great-West Financial

2:45 pm - 3:35 pm

1 Hour/CFP Board and I&WI CE Credits

KEYNOTE ADDRESS • Ballroom of the Americas A-C

Carolyn McClanahan, *Life Planning Partners Inc.*

Building Resiliency For Change—The Future Of Financial Advice

Much of financial advice hinges on predicting the future. Unfortunately, we fail miserably at getting the future right. It is time for the industry to make a change—instead of predictions and projections, we need to provide solutions that prepare clients for whatever the world delivers. Dr. McClanahan will discuss how her firm helps clients focus on a great life in the present while building financial, emotional and physical resiliency for the future. She will cover how the firm addresses each part of the planning process keeping the focus on resiliency in mind.

Conference Adjourns