

2021 ACCUTECH NATIONAL USER CONFERENCE AGENDA

Tuesday, November 16 Arrive at the Hyatt Regency, Check-In

6:00 pm **Welcome Reception -Sponsored by Fifth Third**

Wednesday, November 17

8:00 am **Breakfast in Regency AB -Sponsored by Mid-Atlantic Capital**

9:00 am **Regency CD** **General Session - "State of the Union and Product Road Map"** - Presented by Adam Unger, President and Dan Wright, Executive Director Strategy, Accutech Systems

10:00 am **Regency CD** **Introduction - Strategic Partners and Vendors** - Presented by Dan Wright, Executive Director Strategy, Accutech Systems

10:30 am **Regency AB** **Time with Strategic Partners and Refreshment Break -Sponsored by Federated Hermes**

11:00 am **Regency CD** **General Session - "Industry Trends Driving Product Decisions"** - Presented by Stephen Augstell, Senior Financial Planner and Wealth Advisor, Berkshire Bank; Jeremy Peterson, Regional Sales Manager and Bill Crouch, Regional Sales Manager, Accutech Systems **1.25 CTFA credits**

12:00 pm **Lunch in Regency AB -Sponsored by Chicago Clearing Corporation**

1:00 pm **Regency CD** **General Session - "What's Next for Wealth Management: Transforming Your Ecosystem to Compete Today, Tomorrow and Beyond"** - Presented by Mike Tropeano, Senior Director, Broadridge Consulting Services **1.25 CTFA and CRSP credits**

2:00 pm **Time with Strategic Partners and Refreshment Break**

2:30 pm **Breakout Sessions**

| Regency GH | Regency CD | Regency F |
|---|--|--|
| What Is New in Cheetah - Presented by Craig Bushong, Project Manager, Accutech Systems 1.25 (S) ATOP credits | Digital Assets - Estate Planning - Presented by Evan Carroll, Author | Cheetah Basics - Presented by Iris Lewis-Beasley, Wealth Management Consultant, Accutech Systems and Cheryl Pfenning, Wealth Management Consultant, Accutech Systems |

3:30 pm

| Breakout Sessions | | |
|--|--|--|
| Regency F | Regency CD | Regency GH |
| What Is New in Cheetah - <i>Presented by Valerie Hurwitz, Manager of Development, Accutech Systems</i> 1.25 (S) ATOP credits | Growth Strategies for Trust/Wealth Management Firms - <i>Presented by Lloyd Pohl, CEO, Pohl Consulting and Training, Inc.</i> | Take the Puzzle Out of Financial Planning - <i>Presented by Stephen Augstell, Senior Financial Planner and Wealth Advisor, Berkshire Bank</i> 1.25 CTFA credits |

4:30 pm

Conclusion of First Day Sessions

6:00 pm

Dinner at Hyatt Regency in Studio 220 @ Noma -Sponsored by Broadridge

Thursday, November 18

7:30 am

Breakfast in Regency AB -Sponsored by CAPIS

8:30 am
Regency CD

General Session - "Client Experience: Your Unfair Competitive Advantage"- *Presented by Evan Carroll, Author*

9:30 am
Regency CD

General Session - "ESG Investing–It's Inevitable It's Now"- *Presented by Linda Duessel, Senior Equity Strategist, Senior Vice President, Federated Hermes* **1.25 CTFA and CRSP credits**

10:30 am
Regency AB

Time with Strategic Partners and Refreshment Break

11:00 am
Regency CD

General Session - "Covid Success Stories: Stronger on the Other Side" - *Accutech Systems & Clients*

12:00pm

Lunch in Regency AB

1:00 pm

| Breakout Sessions | | |
|---|--|---|
| Regency F | Regency CD | Regency GH |
| Securities-Based Lending for Fiduciaries: Untapped Liquidity Safety Net & Growth Driver - <i>Presented by Michael Musial, Managing Director, Total Bank Solutions</i> 1.25 (A) ATOP; 1.25 CSOP, CTFA, and CRSP credits | Need to know Tax 2021 - <i>Presented by Presented by Doug Hart, Trust Processing Solutions Managing Partner and Tim Varner, Tax Operations Manager, Wolters Kluwer CCH Trust US</i> 1.25 (T) ATOP; 1.25 CTFA credits | Cheetah™ Training: Fees and Reviews - <i>Presented by Accutech Systems</i> 1.25 (S) ATOP credits |

2:00pm

| Breakout Sessions | | |
|---|--|---|
| Regency CD | Regency GH | Regency F |
| Faults in Our Stars: How the Famous Have Bungled Their Estates - Presented by Becky Kelly and Roger Pond, Fiduciary Education Center 1.25 CFTA credits | Cheetah Investment Overview - Presented by Matt Garrett, Product Manager and Scott Meyer, Product Manager, Accutech Systems 1.25 (S) ATOP credits | Social Selling 101: Why LinkedIn Is Key to Business Development - Presented by Brandon Coppernoll, Digital Marketing Manager, Accutech Systems |

3:00pm **Time with Strategic Partners and Refreshment Break -Sponsored by RIC**

3:30 pm

| Breakout Sessions | | |
|---|---|--|
| Regency CD | Regency GH | Regency F |
| Cheetah Client Panel - Presented by Accutech Systems | What Is New in Cheetah - Presented by Accutech Systems 1.25 (S) ATOP credits | Gold Client Panel - Presented by Accutech Systems |

5:00 pm **Conclusion of Second Day Sessions**
Evening free to meet with Strategic Partners and network with peers.

Friday, November 19

8:00 am **Breakfast in Regency AB -Sponsored by Mainstreet Advisors**

9:00 am **Regency CD** **General Session - "Automation and the Evolution of Wealth Management"** - Presented by Gerard Michael, Smartleaf, Inc. and Smartleaf Asset Management, LLC **1.25 (A) ATOP; 1.25 CSOP, CFTA, and CRSP credits**

10:15 am **Short Break**

10:30 am **Regency CD** **General Session - "President Biden's Tax Changes"** - Presented by Becky Kelly and Roger Pond, Fiduciary Education Center **1.25 (T) ATOP; 1.25 CSOP, CFTA, and CRSP credits**

12:00 pm **Regency CD** **Conference Wrap Up and Concluding Remarks**