

TUESDAY, NOVEMBER 14

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| 12:00–1:00 pm | Operations Committee Lunch |
| 1:00–4:00 pm | Operations Committee Meeting |
| 6:00–8:00 pm | Welcome Reception sponsored by R&T Deposit Solutions and Fifth Third Bank |

WEDNESDAY, NOVEMBER 15

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| 8:00–9:00 am | Breakfast sponsored by MainStreet Advisors | | |
| 9:00–10:00 am | Accutech - <i>State of the Union</i> , Adam Unger , CEO, Accutech Systems | | |
| 10:00–10:30 am | Introductions of Vendors and Logistics | | |
| 10:30–11:00 am | Break | | |
| 11:00 am–12:00 pm | <i>Growth, Stimulus, and Uncertainty</i> , Christian Chan , Chief Investment Officer, AssetMark | | |
| 12:00–1:00 pm | Lunch sponsored by RevSpring | | |
| 1:00–2:00 pm | Crypto 101— <i>An Introduction*</i> , Jody Mettler , President, BitGo Trust | | |
| 2:00–2:30 pm | Break | | |
| 2:30–3:30 pm | Executive Track | Investment Track | Operations Track |
| | <i>Clients are Changing, Are You?</i> Mike Tropeano , Vice President – Wealth, Bank Trust and Retirement Consulting, Broadridge | <i>How Cheetah is Making Proposals and Investments Easier for You</i> , Scott Meyer , Product Manager, Cheetah & Matt Garrett , Product Manager, Moneytree | <i>Cheetah Configurations, Building Blocks to a Solid Foundation</i> , Iris Lewis-Beasley and Kelly Waugh , Wealth Management Consultants, Cheetah |
| 3:30–4:30 pm | Executive Track | Investment Track | Operations Track |
| | <i>Obtaining Optimal Risk Adjusted Revenue</i> , Donald F. Moore, Jr. CEO, Bearmoor, LLC | <i>The Cheetah & AssetMark Partnership</i> , John Henry , Business Development Officer, Financial Institutions, AssetMark & Brandon Jeffress , Executive Director of Sales, Cheetah | <i>Improved Decisions and Better Processes</i> , Craig Bushong , Senior Solutions Architect and Shane Pond , Solutions Consultant, Cheetah |
| 4:30–6:00 pm | Break | | |
| 6:00–8:00 pm | Dinner sponsored by AssetMark and Broadridge | | |
| 8:00–10:00 pm | Piano Bar sponsored by Chicago Clearing Corporation | | |

THURSDAY, NOVEMBER 16

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| 7:00–8:30 am | Breakfast, sponsored by CAPIS | | |
| 8:30–9:30 am | KEYNOTE: <i>One Step at a Time</i> , Josh Bleill , Inspirational Speaker | | |
| 9:30–10:30 am | <i>The Art Of Creating Emotionally Connected Clients</i> , Brendan Frazier , Wired Planning | | |
| 10:30–11:00 am | Break | | |
| 11:00 am–12:00 pm | Executive Track | Investment Track | Operations Track |
| | <i>Trends, Tailwinds, and Challenges</i> , Michael Dixon , Director of Organizational Development, Pohl Consulting & Training, Inc. | <i>Monitoring Best Execution & Managing ETF Strategies for Asset Allocation Portfolios</i> , David Choate , Director of Sales and Trading, COO, CAPIS | <i>Gain Efficiencies through Cheetah Imports</i> , Iris Lewis-Beasley and Kelly Waugh , Wealth Management Consultants, Cheetah |
| 12:00–1:00 pm | Lunch sponsored by Federated Hermes | | |
| 1:00–2:00 pm | Executive Track | Investment Track | Operations Track |
| | <i>80% of a Company's Challenges are People Related, Culture Index Helps Clarify and Solve People Challenges</i> , Patrick McHale , Culture Index, LLC | <i>Top 10 Insights To Master The Human Side of Advice</i> , Brendan Frazier , Founder, Wired Planning | <i>Hot Topics in Trust Regulation*</i> , Becky Kelly & Roger Pond , Fiduciary Education Center |
| <i>Benefits of Insured Deposit Programs During a Banking Crisis</i> , Kevin Bannerton , Executive Vice President, Head of Wealth Management, R & T Deposit Solutions | | <i>How Agility Wins: Techniques from the Software World to Enhance your Business</i> . Valerie Hurwitz , Manager, Development, Cheetah | |
| 2:00–3:00 pm | Break | | |
| 3:30–5:00 pm | Executive Track | Investment Track | Operations Track |
| | <i>Leveraging Professional Services for Growth and Efficiencies</i> , Chris Robinson , Manager of Professional Services, Cheetah | <i>The Rise of Separately Managed Accounts and What Is Attracting Investors</i> , Ryan Nauman , Market Strategist, Zephyr (formerly Informa) | <i>Cheetah Client Panel, Clients and Cheetah Staff</i> |
| 7:30–8:30 am | Cocktail Reception at Sip, sponsored by Zephyr (formerly Informa) | | |

FRIDAY, NOVEMBER 17

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| 7:30–8:30 am | Breakfast, sponsored by NewEdge Capital/American Trust | | |
| 8:30–9:30 am | 2023 Tax Update, CCH, 2023 Tax Update, Tim Varner , Wolters Kluwer/CCH and Doug Hart , Trust Processing Solutions | | |
| 9:30–9:45 am | Break | | |
| 9:45–10:45 am | <i>Topics in Trust & Wealth Management*</i> , Becky Kelly and Roger Pond , Fiduciary Education Center | | |
| 10:45–11:00 am | Closing remarks | | |