



cheetahinc.com/events

Agenda is subject to change.
* denotes continuing education credit sessions

TUESDAY, NOVEMBER 14

12:00–1:00 pm	Operations Committee Lunch
1:00–4:00 pm	Operations Committee Meeting
6:00–8:00 pm	Welcome Reception at Yee-Haw Brewing Co. sponsored by R&T Deposit Solutions and Fifth Third Bank

WEDNESDAY, NOVEMBER 15

8:00–9:00 am	Breakfast sponsored by MainStreet Advisors		
9:00–10:00 am	Cheetah - State of the Union, Adam Unger , CEO, Accutech Systems		
10:00–10:30 am	Introductions of sponsors and conference logistics		
10:30–11:00 am	Break sponsored by Ameritas		
11:00 am–12:00 pm	Growth, Stimulus, and Uncertainty*, Christian Chan , Chief Investment Officer, AssetMark		
12:00–1:00 pm	Lunch sponsored by RevSpring		
1:00–2:00 pm	Crypto 101—An Introduction*, David Chachanko , Director of Trust Administration, BitGo Trust		
2:00–2:30 pm	Break sponsored by Ameritas		
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
6:00–8:00 pm	Dinner sponsored by AssetMark and Broadridge		
8:00–10:00 pm	Jack n' Diane's Piano Bar sponsored by Chicago Clearing Corporation		

THURSDAY, NOVEMBER 16

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, sponsored by First Rate		
9:30–10:30 am	<i>The Art Of Creating Emotionally Connected Clients*</i> , Brendan Frazier , Wired Planning		
10:30–11:00 am	Break sponsored by Ameritas		
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 sponsored by Ameritas		
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*</i> , Clients and Cheetah Staff
7:30–9:30 pm	Cocktail Reception at Ink N Ivy , sponsored by Zephyr (Informa)		

FRIDAY, NOVEMBER 17

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 sponsored by Ameritas
9:45–10:45 am	Topics in Trust & Wealth Management*, Becky Kelly and Roger Pond , Fiduciary Education Center
10:45–11:00 am	Closing remarks