

| TUESDAY, NOVEMBER 12 | | | |
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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 at Friends in Low Places, sponsored by AssetMark | | |
| WEDNESDAY, NOVEMBER 13 | | | |
| 8:00–9:00 am | Breakfast, sponsored by First Rate | | |
| 9:00–9:15 am | Welcome, John Watts , Managing Director of Cheetah | | |
| 9:15–9:30 am | Sponsor Introductions | | |
| 9:30–10:30 am | Cheetah State of the Union, Adam Unger , CEO, Accutech Systems | | |
| 10:30–11:00 am | Break, sponsored by RevSpring | | |
| 11:00 am–12:00 pm | Talking to Clients About the Economy, Politics, and Investing*, Christian Chan , Chief Investment Officer, AssetMark | | |
| 12:00–1:00 pm | Lunch, sponsored by CAPIS | | |
| 1:00–2:00 pm | Customer Experience and the Role Communications Play in Elevating It!*, Matt Swain , Head of Communications, Insights and Experience, Broadridge | | |
| 2:00–2:30 pm | Break | | |
| 2:30–3:30 pm | Executive Track | Investment Track | Operations Track |
| | Writing Your Personal Mission Statement—The Foundation for Your Personal Brand, a Workshop, Scott Smalstig , Revenue Generation Strategist, Intersection | Driving Efficiencies Across Business Development and Portfolio Management*, Shane Pond and Dallas Bergman , Solutions Consultants, Cheetah | Exception Based Processing — Closing the Loophole on Errors and Omissions*, Iris Lewis-Beasley and Kelly Waugh , Wealth Management Consultants, Cheetah |
| 3:30–4:30 pm | Executive Track | Investment Track | Operations Track |
| | RIA Market Trends*, Dan Johnson , Managing Director, F2 Strategy | Navigating the New Normal in Engaging Consumer Investors*, Patrick Spencer , Managing Director, Moneytree | How to Prepare for Audits*, Erin Edwards , Manager, Quality Assurance, Cheetah |
| 6:00–8:00 pm | Dinner at The Renaissance , sponsored by Broadridge; Cocktails sponsored by R&T Deposit Solutions | | |
| 8:00–10:00 pm | After Dinner Event at 6th & Peabody , sponsored by Fifth Third Bank; band sponsored by Chicago Clearing | | |
| THURSDAY, NOVEMBER 14 | | | |
| 7:30–8:30 am | Breakfast, sponsored by Federated Hermes | | |
| 8:30–9:30 am | KEYNOTE: A Company of Owners, Daren Martin , The Culture Architect, Wall Street Journal and USA Today Best Selling Author | | |
| 9:30–10:00 am | Break, sponsored by Zephyr | | |
| 10:00–11:00 am | Make Politics Boring Again, Linda Duessel , Senior Vice President, Federated Hermes | | |
| 11:00 am–12:00 pm | Executive Track | Investment Track | Operations Track |
| | Systems to Win, Valerie Hurwitz , Manager of Development, Cheetah | Should Your Firm Pursue GIPS® Compliance and Verification? Jennifer Barnette , CIPM, Senior Vice President, The Spaulding Group | Digital Account Opening — Convenient, Efficient and Client-Desired*, Shane Pond and Dallas Bergman , Solutions Consultants, Cheetah |
| 12:00–1:00 pm | Lunch | | |
| 1:00–2:00 pm | Executive Track | Investment Track | Operations Track |
| | A Company of Owners: Executive Session, Daren Martin , The Culture Architect, Wall Street Journal and USA Today Best Selling Author | Driving Efficiencies into a Growing Investment Business — Curated Models and SMAs*, Matt Matrisian , AssetMark | Navigating the Operational Challenges of Unique Assets Held in Fiduciary Accounts*, Patrick Alyward , TRUSTworthy Consultants |
| 2:00–3:00 pm | Artificial Intelligence in Wealth Management*, Nayan Madhamshettiwar , Managing Director at First Rate | Trustee Investing Traps*, Susan Lipp , Editor in Chief, Trust & Estates, Jeffay Chang , SVP/Senior Trust and Estate Specialist, Anne Gifford Ewing , SVP/Senior Trusts and Estates Specialist, Zephyr | Creating a an Executable Fee Strategy*, Iris Lewis-Beasley and Kelly Waugh , Wealth Management Consultants, Cheetah |
| 3:00–3:30 pm | Break | | |
| 3:30–5:00 pm | Executive Track | Investment Track | Operations Track |
| | Building A Winning Team, Deseri Garcia , President, Vida Aventura | The New Moneytree — Time for a Change*, Moneytree Software | Cheetah Chats*, Clients and Cheetah Staff |
| 5:00–7:30 pm | Dinner on your own or with sponsors | | |
| FRIDAY, NOVEMBER 15 | | | |
| 7:30–8:30 am | Breakfast, sponsored by MainStreet Advisors | | |
| 8:30–9:30 am | 2024 Tax Update*, Doug Hart , Trust Processing Solutions | | |
| 9:30–9:45 am | Break | | |
| 9:45–10:45 am | Trust Regulation Hot Topics*, Patrick Alyward , TRUSTworthy Consultants | | |
| 10:45–11:00 am | Closing remarks | | |