



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