



TUESDAY, NOVEMBER 12			
12:00–1:00 pm	Operations Committee Lunch – Sylvan Park		
1:00–4:00 pm	Operations Committee Meeting – Sylvan Park		
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 – Germantown 1, 4		
9:00–9:15 am	Welcome, John Watts , Managing Director of Cheetah – Germantown 2-3		
9:15–9:30 am	Sponsor Introductions – Germantown 2-3		
9:30–10:30 am	Cheetah State of the Union, Adam Unger , CEO, Accutech Systems – Germantown 2-3		
10:30–11:00 am	Break, sponsored by RevSpring – Germantown 1, 4		
11:00 am–12:00 pm	Talking to Clients About the Economy, Politics, and Investing*, Christian Chan , Chief Investment Officer, AssetMark – Germantown 2-3		
12:00–1:00 pm	Lunch, sponsored by CAPIS – Germantown 1, 4		
1:00–2:00 pm	Customer Experience and the Role Communications Play in Elevating It!*, Matt Swain , Head of Communications, Insights and Experience, Broadridge – Germantown 2-3		
2:00–2:30 pm	Break, sponsored by Federated Hermes – Germantown 1, 4		
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 – Edgemoor	Driving Efficiencies Across Business Development and Portfolio Management*, Shane Pond and Dallas Bergman , Solutions Consultants, Cheetah – Wedgewood	Exception Based Processing — Closing the Loophole on Errors and Omissions*, Iris Lewis-Beasley and Kelly Waugh , Wealth Management Consultants, Cheetah – Germantown 2-3
3:30–4:30 pm	Executive Track	Investment Track	Operations Track
	RIA Market Trends*, Dan Johnson , Managing Director, F2 Strategy – Wedgewood	Navigating the New Normal in Engaging Consumer Investors*, Patrick Spencer , Managing Director, Moneytree – Edgemoor	How to Prepare for Audits*, Erin Edwards , Manager, Quality Assurance, Cheetah – Germantown 2-3
6:00–8:00 pm	Dinner at The Renaissance , sponsored by Broadridge; Cocktails sponsored by R&T Deposit Solutions – Broadway 1-2		
8:30–10:30 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 New Edge – Germantown 1, 4		
8:30–9:30 am	KEYNOTE: A Company of Owners, Daren Martin , The Culture Architect, Wall Street Journal and USA Today Best Selling Author – Germantown 2-3		
9:30–10:00 am	Break, sponsored by Cheetah – Germantown 1, 4		
10:00–11:00 am	Make Politics Boring Again, Linda Duessel , Senior Vice President, Federated Hermes – Germantown 2-3		
11:00 am–12:00 pm	Executive Track	Investment Track	Operations Track
	Systems to Win, Valerie Hurwitz , Manager of Development, Cheetah – Wedgewood	Should Your Firm Pursue GIPS® Compliance and Verification? Jennifer Barnette , CIPM, Senior Vice President, The Spaulding Group – Edgemoor	Digital Account Opening — Convenient, Efficient and Client-Desired*, Shane Pond and Dallas Bergman , Solutions Consultants, Cheetah – Germantown 2-3
12:00–1:00 pm	Lunch, sponsored by Zephyr – Germantown 1, 4		
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 – Wedgewood	Driving Efficiencies into a Growing Investment Business — Curated Models and SMAs*, Matt Matrisian , AssetMark – Edgemoor	Navigating the Operational Challenges of Unique Assets Held in Fiduciary Accounts*, Patrick Alyward , TRUSTworthy Consultants – Germantown 2-3
2:00–3:00 pm	Artificial Intelligence in Wealth Management*, Nick Rod , Account Executive and Logan Taylor , Sales Consultant, Data Services, First Rate – Wedgewood	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 – Edgemoor	Creating a an Executable Fee Strategy*, Iris Lewis-Beasley and Jerry Gillespie , Wealth Management Consultants, Cheetah – Germantown 2-3
3:00–3:30 pm	Break, sponsored by Moneytree – Germantown 1, 4		
3:30–5:00 pm	Executive Track	Investment Track	Operations Track
	Building A Winning Team, Deseri Garcia , President, Vida Aventura – Wedgewood	The New Moneytree — Time for a Change*, Patrick Spencer and Matt Garrett , Moneytree – Edgemoor	Cheetah Chats*, Clients and Cheetah Staff – Germantown 2-3
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 – Germantown 1, 4		
8:30–9:30 am	2024 Tax Update*, Doug Hart , Trust Processing Solutions – Germantown 2-3		
9:30–9:45 am	Break, sponsored by Intersection – Germantown 1, 4		
9:45–10:45 am	Trust Regulation Hot Topics*, Patrick Alyward , TRUSTworthy Consultants – Germantown 2-3		
10:45–11:00 am	Closing remarks – Germantown 2-3		