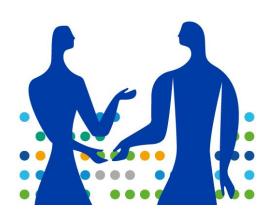


## 2019 WEALTH MANAGEMENT SYMPOSIUM

24 April 2019 | Newport Beach, CA

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	Filling Your Toolbox: Preparing Your Firm for What's Next
8:30 – 9:00 am	Registration and Networking
9:00 – 9:15 am	Opening Remarks by the President of the CFA Society Orange County
9:15 – 10:00 am	GIPS 2020 and Performance Advertising Update
	Amy Jones, CIPM – Guardian Performance Solutions
10:00 - 10:45 pm	Advanced Technology: What's next in Fintech?
	Justin Webster, Director of the Technology Exploration Lab – TD Ameritrade
10:45 – 11:45 am	Portfolio Trends and Construction
	Patrick Nolan, CFA – BlackRock Portfolio Solutions
11:45 – 12:15 pm	Networking Lunch
12:15 – 1:15 pm	Lunch Keynote Speaker:
	Greg Valliere, Chief Global Strategy – AGF
1:15 – 2:15 pm	Practice Management – Lead with Your Values
	JD Bruce, President – Abacus Wealth Advisors
2:15 –3:15 pm	Women and Wealth Panel
	Joy Avedesian, CLTC – Capstone Partners
	Kahne Krause – Dimensional Fund Advisors
	Rhonda Ducote, AIF – Apriem Advisors
	Evelyn Zohlen, CFP – Inspired Financial
3:15 – 3:30 pm	Networking Break
3:30 – 4:30 pm	MIT Age Labs – The Longevity Conundrum and 4 Phases of Retirement
	Julie Genjac – Hartford Funds
4:30 – 5:30 pm	Afternoon Keynote Speaker: The New Networking: 8 Strategies for Building Real
	Relationships
	Sameer Somal, CFA, CFP, CAIA – Blue Ocean Global Technology
5:30 – 5:45 pm	Closing Remarks
5:45 – 7:00 pm	Cocktail Reception