

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