

HBW Partners 2018 Conference Agenda

Tuesday, October 16, 2018

8:30 a.m. – 10 a.m. – Home office visit and breakfast
10 a.m. – 10:30 a.m. – head to Grand Vista in Simi Valley
10:30 a.m. – 11:30 a.m. – Compliance Discussion by Todd Penrod
11:30 a.m. – 12:30 p.m. – Succession Planning by Bryan Casserly & Key Management Group from Cetera
12:30 p.m. – 1 p.m. – Lunch
1:00 p.m. – 2:00 p.m. – ***What's Your Why? ...and How to Build a Successful and Sustainable Business*** by Kurt Ehmann
2 p.m. – 2:30 p.m. – New Generation
2:30 p.m. – 2:45 p.m. – TCA by Aaron Steinberg
2:45 p.m. – 3 p.m. – Betterment by Alexander Choi
3:00 p.m. – 3:10 p.m. – break
3:10 p.m. – 3:25 p.m. – Selling Technologies by Jerry Minardi
3:25 p.m. – 3:40 p.m. – Q3 Tactical by Adam Quiring
3:40 p.m. – 4:05 p.m. – Horizon Investments by Joe Wambach
4:05 p.m. – 4:20 p.m. – Watkinson Capital by Mark Watkinson
4:20 p.m. – 4:35 p.m. – Ascendent Capital Management, LLC by Jordan Kahn, CFA
4:35 p.m. – 4:50 p.m. – Probabilities by Joe Childrey
4:50 p.m. – 5:05 p.m. Millcreek by David Holley
5:05 p.m. – Closing Statements

Wednesday, October 17, 2018 at Hyatt Westlake

7:30 a.m. – 8:20 a.m. Breakfast and Networking with the Sponsors
8:30 a.m. – 10 a.m. – Maximizing Social Media and Inbound Marketing with FMG Suites by Amy Galli from Cetera
10 a.m. – 11 a.m. – Networking and Developing Great Referrals with Dave Ribble
11 a.m. – 12 p.m. – Tactical Investing vs. Fundamental Investing Discussion by Brian Klimke, FA Cetera Investment Director
12:00 p.m. – 12:40 p.m. – Panel on Marketing/Client Acquisition Systems, including Richard Jones, Rick Harbus & Joe Bonanno
12:40 p.m. – 1:30 p.m. – Lunch and Networking with the Sponsors
1:30 p.m. – 1:45 p.m. – Fixed Annuities M & O Marketing – Paul McGillvray
1:45 p.m. – 2:45 p.m. – Client Presentation and The Financial Planning Process by Joel Broersma & Dan Korhorn
2:45 p.m. – 2:55 p.m. – break
2:55 p.m. – 3:55 p.m. – Macroeconomics and Political Ramifications by Tom Streiff
3:55 p.m. – 4:55 p.m. – How Taxes Impact Your Business by Joel & Dan Korhorn
4:55 p.m. – 5:30 p.m. – Giving a Winning Presentation by Richard Jones

Thursday, October 18, 2018

7:30 a.m. – 8:20 a.m. Breakfast
8:30 a.m. – 9:30 a.m. Why Federal Markets by Lou Vaz
9:30 a.m. – 9:45 a.m. – Heritage Living Trusts by Gary Fitzgerald
9:45 a.m. – 10:15 a.m. Available Technology by Cetera
10:15 a.m. – 10:45 a.m. Pay It Forward & Corporate Responsibility by Barney Hellenbrand
10:45 a.m. – 11:00 a.m. break
11:00 a.m. – 12:00 p.m. Breakout 1
 Room A: Federal Employee Market by Lou Vaz & Rick Harbus
 Room B: How Taxes Impact Your Business Advanced Breakout by Joel Broersma & Dan Korhorn & Bryan Geurink
12:00 p.m. – 12:30 p.m. Lunch
12:30 p.m. – 1:30 p.m. Breakout 2
 Room A: Financial Planning Calculators by Joel Broersma and Bryan Geurink
 Room B: Annuities by Paul McGillvray
1:30 p.m. – 2:00 p.m. Richard Jones Client Presentation
2:00 p.m. – 2:30 p.m. Rick Harbus Client Presentation
2:30 p.m. – 3:15 p.m. Introduction to Tactical Models at TCA by Joe Bonanno
3:15 p.m. – 4:00 p.m. Building and Running a Profitable Business by Barney Hellenbrand & Joel Broersma
4 p.m. Closing Statements from Barney Hellenbrand