Annual Private Wealth Management Conference
Thursday, December 2, 2021
8:30 AM – 5:00 PM
Convene CityView
30 South 17th Street, Philadelphia, PA

08:00 AM - 08:45 AM

- Registration and Continental Breakfast
- Networking
- Housekeeping and Introductions

08:45 AM - 9:40 AM

Wealth & Estate Planning Strategies: Planning for Year-end and Beyond

Much uncertainty remains with potential tax law changes that may affect estate planning strategies. Our panel will discuss the critical components of the proposed legislation and describe the impacts on estate planning strategies for clients.

Moderator: Bill Hagan, CFA, Hirtle, Callaghan & Co.

Panelists:

Carl Fiore
Managing Director, Anderson

Helene Jaron
Chair, Private Client Services, Cozen O'Connor

David K. Plotts
Managing Director, Director of Wealth Planning, Glenmede

9:50 AM - 10:30 AM

Next Gen: What They Want from Their Advisors and How to Work with Them

What is the most desired interaction between the next gen and their advisors? Our panel will discuss how clients of the next generation want to receive and view information, how their psychology plays a role in investing and advising and, what is most important to them as wealth management clients.

Moderator: Melissa Novak, CFA, Northern Trust

Panelists:

Stan Treger
Behavioral Insights Advisor, Northern Trust
Taylor Venanzi, CFP
Founder, Activate Wealth
Jason Ray
Founder and CEO, Zenith Wealth Partners

10:30 AM – 11:10 AM

Networking Break

11:10 AM – 12:00 PM

Portfolio Construction

Moderator: **William Hagan, CFA**, Director & Senior Portfolio Manager, Hirtle Callaghan

Dan Braz, CFA
Head of Intermediary ETF Strategist Team, State Street Global Advisors

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12:00 PM – 1:00 PM

Lunch and Networking

Sponsored by Capital Group American Funds

1:00 PM – 2:00 PM

Luncheon Keynote Session

Speaker: Michael Mauboussin, Morgan Stanley Investment Management

Michael Mauboussin is Head of Consilient Research on Counterpoint Global at Morgan Stanley Investment Management. He joined Morgan Stanley in 2020 and has 33 years of investment experience. Previously, he was head of global financial strategies at Credit Suisse and chief investment strategist at Legg Mason Capital Management. Michael is also a best-selling author. His new release is "Expectations

Investing: Reading Stock Prices for Better Returns".

2:10 PM - 3:00 PM

Innovative Organic Growth Strategies for Wealth Managers

Increased competition for new business and "wallet share" has stalled organic growth for some wealth managers, while others have innovated and thrived. What are some of the marketing strategies that today's wealth managers could adopt to meet their growth objectives?

Moderator: **Brian Lauzon, CFA**, InCap Group

Panelists:

Meghan McCartan
Managing Director & Head of Marketing, Hightower Advisors
April Rudin
CEO, The Rudin Group
Joe Anthony
Partner & President, Gregory FCA

3:10 PM – 4:00 PM

Technology and Its Impact on Wealth Planning

Moderator: **Lara Coviello, CFA,** Brinker Capital

4:10 PM - 5:00 PM

Wealth Management M&A: Where We Are and Where We're Going

Wealth management M&A deal activity and valuations are at record levels. What industry dynamics brought us to this point and what does the future hold for wealth management M&A?

Moderator: **Brian Lauzon, CFA**, InCap Group

Panelists:

Brad Mook, CFA
Managing Director, Rosemont Investment Group
Bryan Keller
Chief Strategic Officer, Dakota Wealth Management
Saurabh Desai
Principal, Lovell Minnick Partners

5:00 PM – 6:00 PM

Networking Reception

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