CFA Society Philadelphia

Annual Private Wealth Management Conference

Thursday, December 4, 2025
8:30 AM – 5:00 PM
Convene
30 South 17th Street, Philadelphia, PA

08:00 AM - 08:45 AM

- **Registration and Continental Breakfast**
- **Networking**
- **Housekeeping and Introductions:**
  Brian Lauzon, CFA, Managing Director, Colchester Partners
  Conference Planning Committee Chair

08:45 AM - 9:35 AM

Investment Strategy Panel: Portfolio Positioning for 2026

Moderator: Aaron Filbeck, CAIA, CFA, CFP, CIPM, FDP, Managing Director, CAIA Association

Panelists: Carlin Calcaterra, Managing Director, Investment Strategy, Pitcairn Brad
Cronger, CFA, Deputy CIO, Hirtle Callaghan
Michael Crook, CFA, CIO, Mill Creek Capital Advisors

This panel will explore how leading investors are positioning portfolios for 2026 amid shifting macro dynamics, evolving market structure, and geopolitical shocks. Panelists will discuss opportunities and risks across asset classes, key thematic bets, and how they're balancing resilience with return-seeking opportunities in a rapidly changing market backdrop.

9:35 AM - 10:30 AM

How to Use AI to Increase Efficiency & Drive Growth

Introduction: Brian Lauzon, CFA, Managing Director, Colchester Partners

Presenter: David Itzkovits, CFA, Optimal Advisor AI

This interactive session shows how advisors are using AI today to save hours each week. Through real examples, you'll learn practical techniques to get faster, more accurate results. You'll leave with a clear plan to use AI to run a more efficient, compliant, and profitable practice.

This session is designed for advisors and teams who want to work smarter, communicate better, and grow their business with the help of AI.

• Increase efficiency: Summarize long documents, extract insights, and reduce repetitive tasks. • Enhance Client Communication: Deliver more personalized and compliant messaging with less effort. • Drive Growth: Better prepare for meetings and think strategically about your business. • Get Better AI Outputs: Learn prompting techniques for clearer, more useful output • Built for Advisors: All content is tailored to the day-to-day workflow of financial advisors.

David Itzkovits, CFA is the co-founder of Optimal AdvisorAI, the AI Learning Partner for financial services firms. Optimal AdvisorAI works with Fortune 500 companies, major custodians, broker-dealers, and global asset managers. They train teams to use the AI tools their firms make available and tailor those trainings by role, so advisors, portfolio managers, or sales teams learn AI in the context of their daily work.

_ **10:30 AM – 11:10 AM**

Networking Break

11:10 AM – 12:00 PM

Estate Planning Session

Moderator: Bill Hagan, CFA, Managing Director Hirtle Callaghan

Panelists:

Lindsey Ermey, JD, Regional Fiduciary Manager, BNY
John Boxer, JD, Partner, Morgan Lewis
(Anderson Tax team)

12:10 PM – 2:30 PM

Lunch and Conference Keynote Speaker

Introduction: Brian Lauzon, CFA, Managing Director, Colchester Partners

Keynote: Bill Crager, co-founder of iAltA

Bill Crager, co-founder and former CEO of Envestnet, is a visionary leader who helped transform the wealth management industry through innovation and technology. As a founder of iALTA, he continues to shape the future of financial advice by empowering firms to harness data, AI, and human insight to deliver greater value to clients. Bill's strategic perspective and deep industry experience make him one of

CFA Society Philadelphia

the most respected voices in financial services today. Join us for his keynote address, where he'll share his vision for the next era of intelligent advice and the evolving role of technology in empowering advisors.

2:30 PM - 3:00 PM

Trivia Competition

Facilitator: Kevin Heckman, CFA, Vice President, Strategic Accounts, Rockefeller Capital Management

Think you know the markets? Test your financial savvy in our **Investment Trivia Challenge**, where smart answers will earn you a prize! From stock market history to crypto trends, every question brings you closer to victory — and bragging rights as the ultimate investor.

3:10 PM - 4:00 PM

The Road Ahead for Private Equity and Private Credit

Moderator: Phillip Shankweiler, CFA, CAIA, CFP, Managing Director, Partners Group

Panelists:

Timothy Ringlestein, CFA, Principal, Cerity Partners, Principal
Kunal Shah, Managing Director, iCapital
Paul Saunders, CFA, Executive Director, HPS
Chris Tidmore, CFA, Senior Manager, Vanguard

This session will examine the evolving landscapes of private equity and private credit, highlighting shifts in market fundamentals — from improving earnings and renewed M&A activity to selective stress and changing rate dynamics in credit markets. Panelists will also explore emerging areas of opportunity, including AI-driven value creation in private equity and growth in asset-backed finance and credit secondaries. Here industry experts provide perspective on optimizing portfolio allocations and relative value considerations these private markets as allocators look ahead.

4:00 PM – 5:00 PM

Networking Reception

Thank you to our sponsors of the conference:

BRONZE SPONSORS:

LUNCHEON SPONSOR: RECEPTION SPONSOR:

BREAKFAST SPONSOR: CONFERENCE APP SPONSOR:

ASSOCIATION SPONSOR: