



REGIONAL SUMMIT

OCTOBER 3, 2019
THE RITZ-CARLTON, BOSTON

Boston

12:00–1:00 pm Registration and Lunch

1:00–1:10 pm Welcome Address

Sterling Shea, Global Head, Wealth & Asset Management, Barron's Group

1:10–2:00 pm TBD

CFP I-W

2:00–2:50 pm Assembling a Top Advisory Team to Create Scalability and Superior Service I-W

One of the greatest priorities of successful advisors today is strategic team development. In this session, hear from a top ranked team on how they are successfully managing their operational efficiencies, role responsibilities, internal & external communications, and superior client service.

Sammy Azzouz, Heritage Financial Services Team

Chuck Bean, Heritage Financial Services Team

Jim Scally, Heritage Financial Services Team

Jennifer Watson, Heritage Financial Services Team

Bob Weisse, Heritage Financial Services Team

2:50–3:00 pm Break

3:00–4:00 pm Trump, the Democrats, and the Road to 2020: a Definitive Analysis of the Stakes for Investors in the Critical Year Ahead CFP I-W

The unique nature of the Trump presidency poses challenges for investors and citizens alike, as Washington and the world grapple with a range of economic and foreign policy challenges. What's the right way for investors to think about the run up to 2020? What are the implications for specific domestic and foreign policies, and asset values? Capital Group's senior policy strategist cuts through the noise (and the tweets!) to make sense of the stakes in a lively tour of today's terrain—including some contrarian insights on China, big tech, drug prices, the media, and more.

Matt Miller, Partner and Political Economist, Capital Group; former White House Senior Advisor and Washington Post Columnist

Interviewer: **Michael Schweitzer**, SVP—Head of High Net Worth Strategy and Distribution, Capital Group, Home of American Funds

4:00–4:50 pm Market Themes and Observations

CFP I-W

Jack Hough of Barron's magazine has had the opportunity to discuss and analyze key trends in today's market with various prominent investors. His presentation will deliver an insightful look into what themes are recurring, and where advisors should look to invest in 2019 and beyond.

Jack Hough, Associate Editor, Barron's

Interviewer: **Sterling Shea**, Global Head, Wealth & Asset Management, Barron's Group

4:50–5:00 pm Top Advisors Award Reception

5:00–6:00 pm Cocktail Reception

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