



# Chicago

## REGIONAL SUMMIT

OCTOBER 30, 2019  
THE GWEN, CHICAGO

### 1:00–2:00 pm Registration and Lunch

### 2:00–2:05 pm Welcome Address

**April Ferrell**, Global Managing Director, Wealth & Asset Management, Barron's Group

### 2:05–2:55 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.

**Rees Mason**, Merrill Lynch Wealth Management

**Mark Thorndyke**, Merrill Lynch Wealth Management

### 2:55–3:45 pm Muni Debt Discussion on Illinois, City of Chicago, and Cook County: Where We've Been, Where We Are, and Where Do We Go From Here CFP I-W

A topical discussion on the finances of Illinois, City of Chicago, and Cook County; how they got into the fiscal situation they are in, along with where they go from here. Included in the discussions will be key areas of risk along with areas of opportunity within these locales along with the municipal market overall. His thoughts and insights on what this means for investors, both in terms of risk and opportunity.

**Jonathan Mondillo**, Head of Municipals, Aberdeen Standard Investments

### 3:45–4:00 pm Break

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

CFP I-W

Jack Otter 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 Otter**, Associate Publisher, Wealth & Asset Management, Barron's Group

Interviewer: **April Ferrell**, Global Managing Director, 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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