B ADVISOR

Philadelphia

REGIONAL SUMMIT

NOVEMBER 14, 2019

CONVENE, COMMERCE SQUARE 2001 MARKET

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

Solutions to Solve for Market Uncertainty CFP I-W

In an ideal world, fundamentals alone would drive the markets. But that's not the world we're living in—or investing in. Today, a tweet in the morning can drive a sell-off in the afternoon, only to be reversed by the next day's headlines. It's no wonder that many people are second-guessing whether they should be invested at all. In this session, you will hear from two ETF strategists on investment solutions that may help prepare your client's portfolios for uncertainty in the market.

Jason Bloom, Senior Director, Global Macro ETF Strategy, Invesco

John Feyerer, Senior Director, Equity ETF Strategy, Invesco

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.

Michael Hirthler, Jacobi Capital Management LLC

2:50–3:00 pm

Break

3:00–4:00 pm

Priceless—The Language of Value

CFP I-W

Invesco Consulting teamed up with political consultants and word specialists,Maslansky + Partners, for a six month study on what investors think. What do they value and how should their advisors respond? Do they want low-cost or high value? A financial plan or financial planning? Discretionary accounts or advisor managed accounts? The research uncovered new "cries" from investors and resonating responses from advisors when defending, defining and delivering value. Skills for advisors to develop from the presentation include: how to communicate fees, how to deliver on value, and resonating words, phrases, and sequence of the value conversation.

Gary DeMoss, Director, Invesco Consulting

4:00–4:50 pm

Sea Change: The Critical Trends Impacting the Future of U.S. Wealth Advisory I-W

In a brand new presentation, Sterling Shea of Barron's examines the critical trends influencing the development of the wealth management industry. The presentation will focus on the adjustments and strategic shifts successful advisors are making in order bolster momentum and deliver better, and more viable outcomes.

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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