



San Francisco

REGIONAL SUMMIT

SEPTEMBER 26, 2019
FOUR SEASONS HOTEL SAN FRANCISCO

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

2:55–3:45 pm China's Financial Awakening

CFP I-W

"Let China sleep, for when she wakes she will shake the world"—Napoleon Bonaparte

China's economic awakening started in 1976, when its economy started to open to the rest of the world. This year, it opens up even more. China's domestic bond and equity markets have entered the global stage, thanks to index inclusion. Bond equity index providers now include Chinese government bonds and China A shares into their global indices. This opening of China's domestic capital markets should not be taken lightly. Aberdeen Standard Investment's Ben Sheehan shares his thoughts and insights on what this means for investors, both in terms of risk and opportunity.

Ben Sheehan, Senior Investment Specialist, Equities, Aberdeen Standard Investments

3:45–4:00 pm Break

4:00–4:50 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 the number one ranked team in California on how they are successfully managing their operational efficiencies, role responsibilities, internal and external communications, and superior client service.

Mark Douglass, Morgan Stanley Private Wealth Management

Rachel Murfit, Morgan Stanley Private Wealth Management

Greg Vaughan, Morgan Stanley Private Wealth Management

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

5:00–6:00 pm Cocktail Reception

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