



## REGIONAL SUMMIT

OCTOBER 22, 2019

THE PIERRE, A TAJ HOTEL, NEW YORK

# Tri-State

**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**

## 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.

**The Honorable John Emerson**, Vice Chairman, Capital International, Inc. former Ambassador to Germany, former top White House official

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

**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 and external communications, and superior client service.

**Edmund Agresta**, Morgan Stanley Private Wealth Management

**Sandeep Belani**, Morgan Stanley Private Wealth Management

**Deborah Montaperto**, Morgan Stanley Private Wealth Management

**Lyon Polk**, Morgan Stanley Private Wealth Management

**2:50–3:00 pm**

## Break

**3:00–4:00 pm**

## U.S. Economic Outlook: Recession on the Horizon? CFP I-W

The U.S. economy hasn't experienced a recession in more than a decade. Do trade wars, negative interest rates and inverted yield curves indicate that a downturn is near? Recessions are infrequent, complex and often misunderstood but, most of all, they are difficult to predict. In this session, Capital Group economist Darrell Spence will discuss the key recession signals, the events that have triggered past downturns, and the steps investors can take to prepare for the next one, regardless of when it hits.

**Darrell Spence**, U.S. Economist, Capital Group

**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 to 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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