

Agenda

Wednesday, May 8

10:30 am – 12:00 pm **Women in Wealth Brunch (Castillo Lucena Ballroom)**

1:00 pm – 1:45 pm **Opening Address: Harnessing Your Firm's Next-Level Talent and Growth for Success**
David DeVoe, Founder and CEO, DeVoe & Company

1:45 pm – 2:45 pm **Keynote Address**
Building an All-Star Team that Fuels Growth
Jennifer Koch, SVP, Head Of Organizational Development, Sequoia Financial Group

2:45 pm – 3:15 pm **Networking Break | Partner Exhibits in Exhibitor Lounge**

3:15 pm – 4:00 pm **Creating a Culture to Attract and Retain Top Talent**
Debi Murphy, Managing Director, Partnership Integration, EP Wealth Advisors
Kelly Carolan, Senior Director, People Business Partner, BNY Mellon | Pershing
Matthew Adams, Chief Executive Officer and Managing Partner, Mission Wealth
Moderator: Jane Williams, Special Advisor, DeVoe & Company

4:00 pm – 4:45 pm **Planning for Succession**
Tim Kochis, Special Advisor, DeVoe & Company

6:30 pm – 8:30 pm **Main Evening Event at El Chorro Restaurant**

Thursday, May 9

7:30 am – 8:30 am **Exhibitor Lounge: Registration | Networking Breakfast | Partner Exhibits**

8:30 am – 9:05 am **Unlocking Incentive Compensation**
Doug Johnson, Managing Director, DeVoe & Company

9:05 am – 10:00 am **Tales from the Field: Planning for Succession**
Dr. Peter Fisher, Founding Partner, CEO, Human Investing
Robert Steinberg, Founder and CEO, Blue Chip Partners
Thomas Carroll, Principal, President & CEO, Homrich Berg Wealth Management
Moderator: Peggy Ruhlin, Special Advisor, DeVoe & Company

10:00 am – 10:30 am **Networking Break | Partner Exhibits in Exhibitor Lounge**

10:30 am – 10:50 am **A Case for AI**
Tony Parkin, Wealth Management Executive

10:50 am – 11:35 am **Strategies for Solving NextGen Financing**
Rick Dennen, Founder and CEO, Oak Street Funding
Dustin Mangone, Managing Partner, Director of Invest. Advisor Program, PPC LOAN
Trey Schnippel, Vice President – Investment Advisory Lending, Live Oak Bank
Moderator: Brad Grubb, Managing Director, DeVoe & Company

11:35 pm – 11:50 pm **The Case for Pro Bono: Why Encouraging Pro Bono Service is Good for Business**
Jon Dauphiné, Esq., CEO, Foundation for Financial Planning

11:50 pm – 1:00 pm **Networking Lunch | Partner Exhibits in Exhibitor Lounge**

1:00 pm – 1:45 pm **Key Drivers of Organic Growth**
David DeVoe, Founder & CEO, DeVoe & Company

1:45 pm – 2:45 pm **Featured Speaker**
The First 90 Days: A Comprehensive Action Plan for New Clients to Fuel Growth
Dennis Moseley-Williams, Founder & CEO
Dennis Moseley-Williams Strategic Consulting

2:45 pm – 3:15 pm **Networking Break | Partner Exhibits in Exhibitor Lounge**

3:15 pm – 4:00 pm **The Referral Code: Creating a Pipeline of High Net Worth Referrals**
Brett Van Bortel, Director of Development & Delivery, **Invesco Global Consulting**

4:00 pm – 4:45 pm **How to Build a High-Growth Organization**
Gary Foodim, Chief Marketing Officer, **Mercer Advisors**
Bryan Powers, Executive Vice President, Sales, **Mercer Advisors**

4:45 pm – 6:00 pm **One-on-One Expert Meetings (Alhambra Ballroom)**
Rockin' Rodeo Reception (Exhibit Lounge – Foyer & Terrace)

Friday, May 10

7:30 am – 8:30 am **Exhibitor Lounge: Networking Breakfast | Partner Exhibits**

8:30 am – 8:35 am **Welcome to Day 3**
DeVoe & Company

8:35 am – 9:30 am **Keynote Address**
The Fearless Growth Journey
Aaron Klein, Co-Founder and Former CEO, **Nitrogen** (formerly Riskalyze)
Ben Harrison, Managing Director, Head of Wealth Solutions, **BNY Mellon | Pershing**

9:30 am – 10:10 am **Secrets of Top-Growing Firms**
Indya M. Yuill, Partner, Managing Director, **Beacon Pointe Advisors**
Jason Gordo, President & Co – Founder, **Modern Wealth Management**
Natalie Straub, Chief Revenue Officer, **Coldstream Wealth Management**
Moderator: Joe Anthony, President and Co-Owner, Gregory FCA

10:10 am – 10:35 am **Networking Break | Partner Exhibits in Exhibitor Lounge**

10:35 am – 11:15 am **Driving Growth Through Referrals and Client Acquisition Strategies**
Mike Van Wyk, Director of Customer Research & Insights, **Capital Group**
Antonio Bass, Regional Vice President, RIA Relationship Manager, **Capital Group**

11:15 am – 11:55 pm **Technology Spotlight: Tools to Run A Better Business**
Yelena Melamed, Head of Product, **Catchlight**
Kartik Srinivasan, President, **Advzyon**
Christina Viglietta, Chief of Staff, **Bento Engine**
Moderator: Tony Parkin, Wealth Management Executive

Closing Comments

Program Ends at 12:00 pm

Schedule is subject to change. More sessions and speakers to be added