



Agenda *(Subject to change)*

PRE-CONFERENCE SESSIONS

Sunday, February 5, 2023

9:00 AM EST	Registration opens
1:00 PM – 5:00 PM	See content tracks below
6:00 PM	Opening Reception

For financial advisors

1:00 PM	CFP Ethics Education <i>Eligible for two continuing education (CE) credits</i>
2:40 PM	Coffee break
3:00 PM	ETF University <i>Eligible for two continuing education (CE) credits</i>

For industry and media attendees

1:00 PM	Industry "Chatham House Rules"
2:00 PM	Coffee break
3:00 PM	State of the Business
3:30 PM	Meet The Press
4:15 PM	Regulatory Update

DAY ONE

Monday, February 6, 2023

9:00 AM EST	Welcome remarks
9:20 AM	Navigating the Polycrisis with Ian Bremmer

Track 1: The Next Gen Practice

11:00 AM	Fundamentals of Success
11:20 AM	Advanced Financial Planning
11:50 AM	Model Portfolios in Focus
12:15 AM	Direct Indexing in the Real World

Track 2: Future of Finance

11:00 AM	Institutions in the Polycrisis
11:20 AM	How People Think
11:50 AM	The Rise of Corporate Power & Lessons of DeFi
12:15 AM	Stewardship, ESG, Activism, DAOs

DAY ONE (Continuation)

Combined sessions

2:00 PM	Keynote – to be confirmed
3:00 PM	Keynote – to be confirmed
3:30 PM	Wrap up
4:00 PM	Community Time
8:00 PM	Pub Quiz

DAY TWO

Tuesday, February 7, 2023

Track 1: Build Better Portfolios – Stream stage

9:00 AM EST	Thematics for a New Normal
9:20 AM	TINA Troubles: Equity in Context
9:50 AM	Fixed Income: Modern Perspectives
10:20 AM	Bonds at the Edge? Beyond the AGG
10:40 AM	Coffee break
11:10 AM	Real Alternatives
11:30 AM	American Energy @ A Crossroads
11:50 AM	The Reality of Carbon Transition

Track 2: Be a Better Advisor – Stream stage

9:00 AM	To be determined
9:20 AM	To be determined
9:50 AM	Storytelling for Advisors
10:20 AM	Behavioral Finance Quick Talk
10:40 AM	Coffee break
11:10 AM	AdvisorTech Breaking the Mold
11:30 AM	Visual Capitalist Live
11:50 AM	Social Media, Content & Marketing

Combined sessions

12:00 PM EST	Lunch and Community Time
3:00 PM	Dream stage – to be confirmed
3:30 PM	Dream stage – to be confirmed
4:00 PM	Dream stage – to be confirmed
4:30 PM	Wrap-up
6:00 PM	Closing Party

DAY THREE

Wednesday, February 8, 2023

9:00 AM EST	Community outreach
11:00 AM	Conference ends