



FOCUS ON MARKETING: TARGETED MARKETING IDEAS FOR ADVISORS

**FEBRUARY 7 & 8, 2012
DOUBLE TREE HOTEL – HOUSTON INTERCONTINENTAL AIRPORT**

AGENDA

Tuesday, February 7

9:00 a.m.	<i>Registration</i>
10:00 a.m.	Leveraging your RIA in a Mobile World – Dennis Noto, Trust Company of America
11:00 a.m.	Growing your Business through the 401(k) Market – Marty Kerns, Kerns Capital Management, Inc.
12:00 p.m.	Lunch
1:30 p.m.	Internet Distribution Services - reading, analyzing and reviewing results to improve your marketing efforts – Paul Schatz, Heritage Capital, LLC
2:30 p.m.	TBD
3:30 p.m.	Refreshment Break
4:00 p.m.	Marketing Round Table – open mic – bring your ideas – Moderator: Will Hepburn
5:00 p.m.	Adjourn

Wednesday, February 8

7:30 a.m.	Breakfast Buffet
9:00	Sponsor Presentation – Terike Novak, Security Benefit / A Guggenheim Partners Company
10:00	Compliance Relating to 401(k) Business, Social Media and General Marketing – Richard Carney, Esquire, Quarles & Brady LLP
11:00	How to Create and Execute a Successful Webinar – Mike Posey, Halbert Wealth Management
12:00 p.m.	Lunch

THANK YOU MARKETING CRAM SESSION SPONSORS!

**Trust Company of America
Guggenheim Investments**