



NATIONAL ASSOCIATION OF ACTIVE INVESTMENT MANAGERS

Uncommon Knowledge 2017

April 30 – May 3

Hilton San Diego Resort and Spa

Sunday, April 30

7:00 AM NAAIM Fishing Excursion (members only)
10:30 AM NAAIM Golf Classic – Torrey Pines South (members only)
4:00-6:30 PM Solo Advisors Meeting (Moderator: Mike Dean)
7:30 PM NAAIM Welcome Reception (Cash Bar)

Monday, May 1

7:00-9:00 AM NAAIM Board Meeting
8:00-9:00 AM New Member Registration/Welcome Orientation
8:00 AM Registration/Sponsor Hall Opens – Continental Breakfast
9:00 AM Welcome – Ken Graves, President
9:15-10:15 AM **Doug Ramsey, CFA, CMT, The Leuthold Group**
10:15-10:45 AM Refreshment Break – Sponsor Hall
10:45-11:00 AM ProFunds (Platinum Sponsor Announcement)
11:00-12:00 PM **Tactical and Fundamental: How they can work together** - Joe Maas, Synergy Financial Management
12:00-1:15 PM Lunch and Sponsor Introductions
1:15–1:30 PM Guggenheim (Platinum Sponsor Announcement)
1:30-2:30 PM **Compliance Insights** – Thomas Giachetti, Stark & Stark Attorneys at Law; Interviewed by Mary Collins, Spectrum Financial, Inc.
2:30-3:15 PM Member Panel Presentation - TBA
3:15–3:45 PM Refreshment Break – Sponsor Hall
3:45 – 4:45 PM **Escaping the Growth Plateau** - Erin Tamberella, Executive Transformations, Inc.
5:00 PM Break until Evening Event
6:00–9:00 PM Monday Evening Dinner Event – Hilton San Diego Resort and Spa

Tuesday, May 2

7:00-8:15 AM Continental Breakfast – Sponsor Hall
8:15-8:30 AM Direxion (Platinum Sponsor Announcement)
8:30-9:30 AM **Investing During the Trump Administration: Finding Opportunity And Avoiding Danger In Global Markets**– John Kosar, Asbury Research
9:30-10:30 AM **Get Massive Exposure to Grow Your Business** – Christina Daves, PR for Anyone®

Uncommon Knowledge 2017 – Agenda

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10:30-11:15 AM	Gold Sponsor Break-out Sessions: 1) Trust Company of America 2) Dressander BHC
11:15-11:45 AM	Refreshment Break – Sponsor Hall
11:45-12:45 PM	Identifying Market Tops – NAAIM Member Panel: Vishal Muni, WP Asset Management ; Mark Pankin, MDP Associates; Ron Rough, FSA Advisory Services, Inc., and Moderator, Matt Spangler, Signal Research
12:45 - 1:45 PM	Lunch
1:45 – 2:15 PM	NAAIM Membership Meeting and Awards
2:15 – 2:30 PM	Advisors Preferred (Platinum Sponsor Announcement)
2:30 – 3:30 PM	Would a Buyer Find your Firm of Interest? Chad Williams, AVEO Capital with NAAIM member Ben Warwick
3:30- 4:15 PM	Gold Sponsor Break-Out Sessions (2 Firms) 1) Princeton Fund Advisors, LLC 2) Security Benefit
4:15- 4:45 PM	Refreshment Break – Sponsor Hall
4:45 -6:15 PM	Round Tables (2 sessions) <ul style="list-style-type: none">• Pros & Cons of Trend Following• Choosing your Securities in a Regulated Industry• Further discussion on using both Fundamental & Technical Analysis• Charting Best Practices• Content Marketing Part II• Raising Assets in 2017
6:15 – PM	Break until Evening event
7:00 PM	Tuesday Night Event – Sponsor Hall

Wednesday, May 3

7:30 – 8:30 AM	Continental Breakfast – Sponsor Hall
8:30 - 9:30 AM	NAAIM Founders Award Winner - TBA
9:30 -10:30 AM	Uncommon Knowledge about Raising Assets – Lisa Vioni, Hedge Connection with Emily Collins, Spectrum Financial, Inc.
10:30 -11:00 AM	Refreshment Break – Sponsor Hall
11:00 – 12:00 AM	A Qualitative Approach to Best Execution – Ana Burke, PLIA
12:00 – 1:00 PM	Where did my Alpha Go? Bridging the Gap Between Idea and Implementation – Michael Wightkin, Trade Informatics
1:00 – 2:00 PM	Closing Lunch
2:00 PM	NAAIM Shark Tank – Presentation of 12 strategies
4:30 PM	Adjourn