



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 Deep Sea Fishing Excursion (Members and their guests 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

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 – Emily Frazier, Agenda Committee Chair and Ken Graves, President
9:15-10:15 AM	How to Play the Stock Market Melt Up - Doug Ramsey, CFA, CMT, The Leuthold Group
10:15-10:45 AM	Refreshment Break – Sponsor Hall
10:45-11:00 AM	<i>Direxion (Platinum Sponsor Announcement)</i>
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
1:15–2:15 PM	Compliance Insights – Thomas Giachetti, Stark & Stark Attorneys at Law; Interviewed by Mary Collins, Spectrum Financial, Inc.
2:15-2:30 PM	<i>ProFunds (Platinum Sponsor Announcement)</i>
2:30 – 3:15 PM	Investment Strategies and Tactics for a Rising Rate Environment - Kieran Kirwan, CAIA, Director, Investment Strategies, ProShares
3:15 – 3:45 PM	Refreshment Break – Sponsor Hall
3:45 – 4:45 PM	Escaping the Growth Plateau - Erin Tamberella, Executive Transformations, Inc.
4:45 – 5:00	<i>Guggenheim (Platinum Sponsor Announcement)</i>
5:00 – 5:45	The Core Conundrum - William Costigan, Guggenheim Investments
5:45 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 - 8:00 AM	Continental Breakfast – Sponsor Hall
8:00 - 8:15 AM	<i>Advisors Preferred (Platinum Sponsor Announcement)</i>
8:15 - 9:15 AM	Investing During the Trump Administration: Finding Opportunity and Avoiding Danger in Global Markets – John Kosar, Asbury Research
9:15 - 10:15 AM	Get Massive Exposure to Grow Your Business – Christina Daves, PR for Anyone®
10:15 -10:45 AM	Refreshment Break
10:45 – 11:30 AM	Gold Sponsor Break-out Sessions: 1) Trust Company of America 2) Dressander BHC
11:30 - 12:30 PM	Would a Buyer Find your Firm of Interest? Chad Williams, AVEO Capital with NAAIM member Ben Warwick
12:30 - 1:30 PM	Lunch
1:30 – 2:00 PM	NAAIM Membership Meeting and Awards
2:00 – 3:00 PM	Identifying Market Tops – NAAIM Member Panel: Vishal Muni, WP Asset Management ; Ron Rough, FSA Advisory Services, Inc.; Will McGough, Stadion; Maia McGehee, Hermes Econometrics and Moderator, Matt Spangler, Signal Research
3:00 –3:45 PM	Gold Sponsor Break-Out Sessions (2 Firms) 1) Princeton Fund Advisors, LLC 2) Security Benefit
3:45 – 4:15 PM	Refreshment Break – Sponsor Hall
4:15 – 5:45 PM	Round Tables (2 sessions) (Switch at 45 minutes) <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
5:45 PM	Break until Evening event
6:30 PM	Tuesday Night Event – Sponsor Hall

Wednesday, May 3

7:30 – 8:30 AM	Continental Breakfast – Sponsor Hall
8:30 - 9:30 AM	Achieve Your Goals More Often: A Case for Active Allocation – Franklin Parker, Bright Wealth Management NAAIM 2017 Founders Award Winner
9:30 -10:30 AM	Uncommon Knowledge about Raising Assets – Lisa Vioni, Hedge Connection with Emily Frazier, 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 – John Wightkin, Trade Informatics
1:00 – 2:00 PM	Closing Lunch
2:00 PM	NAAIM Shark Tank – Presentation of 10 strategies
4:30 PM	Adjourn