

# Uncommon Knowledge 2018

## April 22 – April 25

### Wyndham Grand Orlando Resort Bonnet Creek

#### Monday, April 23

7:00-9:00 AM	NAAIM Board Meeting - <i>Bimini</i>
8:00-9:00 AM	New Member Registration/Welcome Orientation - <i>Expedition</i>
8:00 AM	Registration/Sponsor Hall Opens – Continental Breakfast – <i>Ponce De Leon III-VII</i>
9:00 AM	Welcome – Steve Williamson, Agenda Committee Chair and Emily Frazier, President – <i>Ponce De Leon I-II</i>
9:15-10:15 AM	<b>“Evidence Over Emotion” – The Opportunity Still Exists</b> - Tony Dwyer, Canaccord Genuity – <i>Ponce De Leon I-II</i>
10:15-10:45 AM	Refreshment Break – Sponsor Hall – <i>Ponce De Leon - III-VII</i>
10:45-11:00 AM	<b>Advisors Preferred</b> – <i>Platinum Sponsor Introduction– Ponce De Leon – I-II</i>
11:00-12:00 PM	<b>The Challenges for Tomorrow- Succession Planning Member Panel</b> – Ken Graves, Capital Research Advisors, LLC; Matt Spangler - Signal Research Group; and Dave Taucher, Sequoia Financial Group
12:00-1:15 PM	Lunch and Sponsor Introductions – <i>Tesoro Cove</i>
1:15–2:15 PM	<b>BEWARE: THE BULLY LIVES-The SEC Continues to Become INCREASINGLY More Aggressive and Punitive During the Regulatory Examination Process</b> – Thomas Giachetti, Stark & Stark Attorneys at Law – <i>Ponce De Leon I-II</i>
2:15-2:30 PM	<b>Guggenheim</b> - <i>Platinum Sponsor Introduction – Ponce De Leon I-II</i>
2:30 – 3:30 PM	<b>7 Key Strategies for a Winning Pitch</b> – Stephanie Silverman, Silverman Speech Consulting – <i>Ponce De Leon I-II</i>
3:30 – 4:00 PM	Refreshment Break – Sponsor Hall – <i>Ponce De Leon III-VII</i>
4:00 – 5:00 PM	<b>Money, Madness and the Stock Market; Investment Rules for Tumultuous Times</b> – Jeffrey Weiss, Clearview Trading Advisors, Inc. – <i>Ponce De Leon – I-II</i>
5:00 – 6:00 PM	<b>Break until Monday Evening Dinner Party</b>
6:00–8:30 PM	Monday Evening Dinner Event – <i>Tesoro Cove</i>

#### Tuesday, April 24

7:30 – 8:30 AM	Continental Breakfast – Sponsor Hall – <i>Ponce De Leon III-VII</i>
8:30 - 9:30 AM	<b>Behavioral Factors may be more Important to Active Managers than they Realize</b> – Richard Lehman, Adjunct Professor of Behavioral Finance, UC Berkeley Extension – <i>Ponce De Leon I-II</i>
9:30 – 9:45 AM	<b>ProFunds</b> - <i>Platinum Sponsor Introduction-Ponce De Leon – I-II</i>
9:45 – 10:45 AM	<b>Balancing a Rapidly Growing Business with a Rapidly Growing Family</b> – Benjamin Brandt, Capital City Wealth Management, Inc. – <i>Ponce De Leon I-II</i>
10:45 – 11:15 AM	Refreshment Break – Sponsor Hall – <i>Ponce De Leon III-VII</i>

11:15 – 12:00 PM	<b>Washington's Impact on Wall Street</b> – Sponsor Member Panel: Catherine Ayers-Rigsby, Advisors Preferred CEROS; Ed Egilinsky, Direxion; Ben Phillips, EventShares; Carl Resnick, Guggenheim and Kieran Kirwan, ProShares
12:00 – 1:00 PM	<b>Preventing the Breach</b> – Robert Krug, SonicWall – <i>Ponce De Leon I-II</i>
1:00 – 2:00 PM	<b>Lunch</b> – <i>Tesoro Cove</i>
2:00 – 2:15 PM	<b>Direxion - Platinum Sponsor Introduction-Ponce De Leon – II-VII</b>
2:15 – 3:00 PM	<b>Intro to Bitcoin and Cryptocurrencies</b> – David Bush, ALPHATATIVE, LLC
3:00 – 4:00 PM	<b>RRGs-A Unique Way to Display Relative Strength-</b> Mathew Verdouw, Optuma – <i>Ponce De Leon I-II</i>
4:00 – 4:30 PM	Refreshment Break – Sponsor Hall – <i>Ponce De Leon I-II</i>
4:00 – 4:45 PM	<b>Gold Sponsor Break-Out Sessions</b> (concurrent sessions) A. <b>Harnessing Advances in Machine Learning</b> – Princeton Fund Advisors, LLC - <i>Journey B</i> B. <b>The Future is Now! Introducing TCA by E*Trade</b> – Trust Company of America - <i>Discovery</i>
4:45 – 6:15 PM	<b>Round Tables</b>   2 Sessions   45 minutes each   <i>Journey A, Journey B,</i> <i>Discovery, Ponce De Leon I-II</i> <ul style="list-style-type: none"> <li>• Cybersecurity</li> <li>• Analysis/Modeling</li> <li>• Content Marketing</li> <li>• Practice Management</li> </ul>
6:15 PM	Break until Evening Event
6:30 PM	<b>All Conference Dinner Party</b> – Sponsor Hall – <i>Ponce De Leon III-VII</i>

### **Wednesday, April 25**

7:30 – 8:30 AM	Continental Breakfast – Sponsor Hall
8:30 - 9:30 AM	NAAIM Founders Award 1st Place Paper: <b>Earnings Acceleration and Stock Returns</b> —Gans Narayanamoorthy and Shuoyuan He, A.B. Freeman School of Business, Tulane University – <i>Ponce De Leon I-II</i>
9:30 -10:15 AM	<b>NAAIM Annual Membership Meeting and Awards</b> – (Regular members only) – <i>Ponce De Leon I-II</i>
10:15 – 10:45 AM	Refreshment Break – Sponsor Hall – <i>Ponce De Leon III-VII</i>
10:45– 11:45 PM	<b>Mining the NAAIM Indicator Wall</b> – Len Fox, Scarecrow Trading – <i>Ponce De Leon I-II</i>
11:45 – 1:00 PM	Closing Lunch – <i>Upper Pool Deck</i>
1:30 PM	<b>NAAIM Shark Tank – Strategy Presentations</b> – <i>Ponce De Leon I-II</i> – Presenters: Steve Williamson, Blackstone Wealth Management; Tom Hardin, Canterbury Investment Management; Paul Glance, Glance LLC; Dave Moenning, Heritage Capital Research; Jay Peroni, Signal Research Group, LLC; and Jody Team, Team Financial Strategies
4:00 PM	Adjourn