



Uncommon Knowledge 2018 April 22 – April 25 Wyndham Grand Orlando Resort Bonnet Creek

Sunday, April 22

- 7:00 AM NAAIM Fishing Excursion (Members and their guests only)
10:30 AM NAAIM Golf Classic – (Members only) - Celebration Golf Course -
4:00-6:30 PM Solo Advisors Meeting - Moderator: Mike Dean, DFG Advisory, LLC -
Expedition
7:30 PM – 9:00 PM NAAIM Welcome Cocktail Reception – *Pool Deck*

Monday, April 23

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

Tuesday, April 24

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| 8:00 AM | Continental Breakfast – Sponsor Hall – <i>Ponce De Leon III-VII</i> |
| 8:30 - 9:30 AM | Behavioral Factors may be more Important to Active Managers than they Realize – Richard Lehman, Adjunct Professor of Behavioral Finance, UC Berkeley Extension – <i>Ponce De Leon I-II</i> |
| 9:30 – 9:45 AM | Advisors Preferred - <i>Platinum Sponsor Introduction</i> – <i>Ponce De Leon – I-II</i> |
| 9:45 – 10:45 AM | Balancing a Rapidly Growing Business with a Rapidly Growing Family – 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> |
| 10:45 – 11:30 AM | The Revival of Actively Managed Investment Products – Sponsor Member Panel – <i>Ponce De Leon I-II</i> |
| 11:30 AM – 12:30 PM | Preventing the Breach – Robert Krug, SonicWall – <i>Ponce De Leon I-II</i> |
| 12:30 – 1:30 PM | Lunch – <i>Tesoro Cove</i> |
| 1:30 - 1:45 PM | Direxion - <i>Platinum Sponsor Introduction</i> - <i>Ponce De Leon – II-VII</i> |
| 1:45 – 2:30 PM | Intro to Bitcoin and Cryptocurrencies – David Bush, ALPHATATIVE, LLC |
| 2:30 – 3:30 PM | RRGs-A unique way to display Relative Strength - Mathew Verdouw, Optuma – <i>Ponce De Leon I-II</i> |
| 3:30 – 4:00 PM | Refreshment Break – Sponsor Hall – <i>Ponce De Leon I-II</i> |
| 3:30 – 4:15 PM | Gold Sponsor Break-Out Sessions (concurrent sessions) A. Princeton Fund Advisors – <i>Journey B</i> B. Trust Company of America - <i>Discovery</i> |
| 4:15 – 5:45 PM | Round Tables – 2 Sessions 4 Topics Switch tables at 45 minutes |
| 5:45 PM | Break until Evening event |
| 6:30 PM | Tuesday Night Event – Sponsor Hall – <i>Ponce De Leon III-VII</i> |

Wednesday, April 25

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| 7:30 – 8:30 AM | Continental Breakfast – Sponsor Hall – <i>Ponce De Leon III-VII</i> |
| 8:30 - 9:30 AM | NAAIM Founders Award Paper Winner TBA – <i>Ponce De Leon I-II</i> |
| 9:30 -10:15 AM | NAAIM Annual Membership Meeting and Awards: (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 | Mining the NAAIM Indicator Wall – 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 | NAAIM Shark Tank – Strategy Presentations – <i>Ponce De Leon I-II</i> . Presenters: Blackstone Wealth Management; Canterbury Investment Management; Glance LLC; Heritage Capital Research; Lanier Capital Partners; Signal Research Group, LLC; Team Financial Strategies |
| 4:00 PM | Adjourn |