

OUTLOOK 2018 | November 5 & 6 | Marriott Chicago O'Hare

AGENDA

Monday, November 5

8:00 AM	Registration
8:30 AM	Welcome – Steve Williamson, NAAIM President
8:45 – 9:45 AM	Climbing the Wall of Worry 2019 Market Outlook – Will Geisdorf, CMT, ETF Strategist, Ned Davis Research
9:45 – 10:30 AM	My Market Outlook Member Panel – Dave Moenning, Heritage Capital Research; Paul Schatz, Heritage Capital; and Michael Gayed, Pension Partners
10:30 – 11:00 AM	Refreshment Break
11:00 – 12:00 PM	The Pros and Cons of Financial Planning in your Practice Member Panel – Ken Graves, Capital Research Advisors, LLC; Jody Team, Team Financial Strategies; and Laura Redfern, Shadowridge Asset Management, LLC
12:00 – 1:30 PM	Lunch – Sponsor Introductions
1:30 – 2:30 PM	Stop Asking for Referrals and Start Earning Them – Wayne Townsend, General Manager, Platinum Advisor Strategies
2:30 – 3:15 PM	Share Class Dilemma – Ron Rough, CFA, Director of Portfolio Management, Financial Services Advisory, Inc.
3:15 – 3:45 PM	Refreshment Break
3:45 – 4:30 PM	What's Working for Your Business? Member Lightning Round – Audience Participation
5:30 PM	Conference Evening Event

Tuesday, November 6

7:30 – 8:15 AM	Continental Breakfast – Sponsor Hall
8:15 – 9:15 AM	Bond Market Facts & Fiction...Information that will Surprise You – Marilyn Cohen, President, Envision Capital Management, Inc.
9:15 – 10:00 AM	Challenges of Running a Tactical Allocation Portfolio – Jeffrey Cribbs, CFP®, Managing Principal, Chicago Wealth Management, Inc.
10:00 - 10:30 AM	Refreshment Break – Sponsor Hall
10:30 AM – 11:30 AM	Speaker to be announced
11:30 AM – 12:30 PM	Lunch
12:30 – 1:30 PM	Stoking the Fire of Business Growth through Marketing Member Panel - Patrick Beauden, Belvedere Advisors, LLC; Emily Frazier, Spectrum Financial, Inc.; and Dina Fliss, Global View Capital Management. Panelists will be discussing Social Media/Video, Distribution Channels and Client Events
1:30 – 1:45 PM	Refreshment Break
1:45 – 2:30 PM	Round Table Sessions: Small groups with attendee participation. Topics: <ul style="list-style-type: none"> • Marketing – Moderator: Ryan Redfern, Shadowridge Asset Management, LLC • Trading Techniques – David Bush, ALPHATATIVE LLC • Managing Client Expectations/When Trades go Bad/Successes and Failures – Jody Team, Team Financial Strategies

2:30 – 3:30 PM

Securing Alpha w/ Artificial Intelligence – David Aferiat, Co-Founder, Managing Partner, Trade Ideas, LLC

3:30 PM

Conference Adjourns