



Uncommon Knowledge

CONFERENCE 2019

Focus on Growth April 28 – May 1

Sunday, April 28

10:30 AM	NAAIM Golf Tournament – Talking Stick Golf Club
4:00 PM	Solo Advisors Meeting – DoubleTree Resort Paradise Valley
7:00 PM	Welcome Reception – DoubleTree Resort Paradise Valley

Monday, April 29

8:00 – 8:45 AM	New Attendee Member Registration & Welcome Orientation
7:45 AM	Registration Sponsor Hall Opens – Continental Breakfast
8:45 AM	Welcome – Steve Williamson, NAAIM President
9:00 – 10:00 AM	Long Pause or Finally a Peak? Where the Global Economy Stands and the Outlook for Asset Markets – George Pearkes, Chief Global Strategist, Bespoke Investment Group
10:00 – 11:00 AM	Get Your Head in the Game: The Latest in Trading Psychology and How To Turn Cognitive Weakness Into Strengths! – Brett Steenbarger, Ph.D, SUNY Upstate Medical University
11:00 – 11:20 AM	Refreshment Break – Sponsor Hall
11:20 – 12:00 PM	NAAIM Member Panel - TBA
12:00 – 1:15 PM	Lunch and Sponsor Introductions
1:15 – 2:30 PM	It's all about the Benjamins! How to Successfully Complete a 2019 SEC Exam and Avoid Costly SEC Findings - Thomas D. Giachetti, Esq., Stark & Stark Attorneys at Law
2:30 – 3:45 PM	Market Like a Start Up: Growth Hacking and Digital Marketing Tactics from Financial Tech - <i>Justin Wood</i> - KRFTWRK
3:45 – 4:15 PM	Refreshment Break – Sponsor Hall
4:15 – 5:45 PM	NAAIM Round Table Discussions 2 Sessions Topics: 1. Digital Marketing 2. Technical Analysis 3. Financial Planning
6:15 – 8:00 PM	Dinner Party – Hosted by Platinum Sponsors

Tuesday, April 30

7:15 – 8:15 AM	Continental Breakfast – Sponsor Hall
8:15 - 9:30 AM	A Contrary Approach to Technical Trading Techniques - <i>Ray Rondeau, President, Q-Prime2</i>
9:30 – 10:15 AM	Gold Sponsor Break-Out Sessions: E*Trade Advisory Services
10:15 – 10:30 AM	Refreshment Break – Sponsor Hall
10:30 – 11:45 AM	Growing through Acquisition: New Strategies Available for Succession and Acquisition - Erik Pahlow, Executive Vice President, Succession Resources Group
11:45 – 12:45 PM	Lunch
12:45 – 2:00 PM	Breaking Through Stagnation: #1 Goal of Every Business is to Make a Profit! Let's Make More – TBA
2:00 – 3:00 PM	Taking Your Business to a Different Level 3 Breakouts Focusing on: a) How to Grow to \$100 Million b) How to Grow to from \$100-\$250 Million c) How to Grow from \$250 Million to \$1 Billion and Beyond
3:00 – 3:30 PM	Refreshment Break – Sponsor Hall
3:30 – 4:15 PM	Lightening Round with a TWIST! Attendee Participation
5:00 PM	Arizona Diamondbacks vs. New York Yankees, Chase Field, Phoenix – Busses leave hotel for the game

Wednesday, May 1

7:30 – 8:30 AM	Continental Breakfast – Sponsor Hall
8:30 - 9:30 AM	NAAIM Founders Award 1st Place Winner - TBA
9:30 -10:15 AM	NAAIM Annual Membership Meeting and Awards – (Regular members only) –
10:15 – 10:45 AM	Refreshment Break – Sponsor Hall –
10:45– 11:45 AM	You're Doing It All Wrong! – Portfolio Design for Modern Markets – Member Panel Moderator – David Moenning, Heritage Capital Research
11:45 – 1:00 PM	Closing Lunch
1:30 PM	NAAIM Shark Tank Strategy Investing Competition – Finalist Presentations
4:00 PM	Adjourn