



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 – 1:30 PM	ProFunds – Platinum Sponsor Introduction
1:30 – 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 – 2:45 PM	Direxion - Platinum Sponsor Introduction
2:45 – 3:45 PM	Technology is Rapidly Changing the World of Finance. Are you on the Right Side of Change? – Justin Wood, Founder, 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 Progressive Investing Approach – A Paradigm Shift** - Ray Rondeau, President, QPrime2
- 9:30 – 10:15 AM **Gold Sponsor Break-Out Sessions** (Concurrent):
1. E*Trade Advisory Services
 2. Princeton Fund Advisors, LLC
- 10:30 – 10:45 AM Guggenheim – Platinum Sponsor Introduction
- 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 – 1:00 PM Advisors Preferred – Platinum Sponsor Introduction
- 1:00 – 2:00 PM **Key Strategic Planning Ideas to Grow Your Firm** – John Furey, Advisor Growth Strategies, LLC
- 2:00 – 3:00 PM **Concurrent Breakouts:**
- a) Ten Cost Effective Ideas to Grow Your Firm from \$30 Million to \$100 Million
 - b) Ten Ideas to Help You Grow from \$75 Million to \$250 Million
 - c) Ten Ideas to Help You Grow Your Firm 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**
- 4:30 PM Adjourn