

AGENDA

OUTLOOK 2019 | November 11 & 12 | Dallas/Ft Worth

Sunday, November 10

6:00 PM	Welcome Reception
7:00 – 9:00 PM	NAAIM Shark Tank Finals Competition <ul style="list-style-type: none"> • 7:00 PM – Stock Selection Strategies • 8:00 PM – Tactical Strategies

Monday, November 11

8:00 AM	Registration
8:45 AM	Welcome – Matt Spangler, NAAIM President
9:00 – 10:00 AM	Is the Patient Too Old For A Transplant? – Doug Ramsey, Chief Investment Officer & Portfolio Manager, The Leuthold Group, LLC.
10:00 – 10:45 AM	Software to Drive Efficiency NAAIM Member Panel
10:45 – 11:15 AM	Refreshment Break
11:15 – 12:15 PM	Other Revenue Streams for Your Business – NAAIM Member Panel Topics: Financial Planning, Newsletter/Subscriptions, Insurance, or Tax Accountants
12:15 – 1:45 PM	Lunch – Sponsor Introductions & Winner of the Outlook Shark Tank Finals to be announced
1:45 – 2:45 PM	Using Market Internals and Technical Outlook – Katie Stockton, CMT, Founder and Managing Partner, Fairlead Strategies, LLC
2:45 – 3:30 PM	What's Working for Your Business? General Session – Audience Participation
3:30 – 4:00 PM	Refreshment Break
4:00 – 4:45 PM	When Do You Pull the Plug on a Dead Strategy? – NAAIM Member Panel
5:30 PM	All Conference Dinner Party – Off site – Hard Eight BBQ

Tuesday, November 12

8:00 – 9:00 AM	Continental Breakfast – Sponsor Hall
9:00 – 10:00 AM	You Get an Audit, and You Get an Audit! Everybody Gets an Audit! – Ivan Barretto, Managing Director, RIA Compliance Concepts, LLC
10:00 – 10:45 AM	What Has Blown-Up Your Business? NAAIM Member Panel
10:45 – 11:15 AM	Refreshment Break – Sponsor Hall
11:15 AM – 12:15 PM	How to Leverage APIs and Custom Software Development - Michael Wheeler, Splicer Technology, LLC
12:15 AM – 01:15 PM	Lunch
1:15 – 2:15 PM	Proven Marketing Systems, Automations & Infrastructure to Unleash Your Firms Ultimate Potential – Draye Redfern, Founder and Ambassador of Buzz, Redfern Media
2:15 – 2:30 PM	Refreshment Break
2:30 – 3:30 PM	Round Table Sessions - <i>Small groups with attendee participation</i> <ol style="list-style-type: none"> 1. Communication: Client expectations of not beating the market 2. Socially Responsible Investing 3. Marketing 4. Trading Techniques
3:45 PM	Conference Adjourns