



AGENDA

OUTLOOK 2021 | October 11 & 12 | Chicago, IL

Monday, October 11

7:30 AM	Registration – Breakfast
8:15 AM	Welcome – Matt Spangler, NAAIM President
8:30 – 9:30 AM	Technical Take on Markets – Helene Meisler, Market Columnist, Realmoney
9:30 – 10:15 AM	Member Panel Practice Management – Delegating, Collaborating and Outsourcing
10:15 – 10:45 AM	Refreshment Break
10:45 – 11:45 AM	Investing in Newest Asset Class: Cryptocurrencies - Matt McCall, Penn Financial Group
11:45 – 12:45 PM	Lunch
12:45 – 1:45 PM	Monthly Macro Scouting Report - October 2021 – Darius Dale, Founder and CEO, 42 Macro LLC
1:45 – 2:30 PM	Member Panel How you can use Marketing to Increase your AUM
2:30 – 2:45 PM	Refreshment Break
2:45 – 3:45 PM	What Gets Watered Grows: How to Grow your Business from the Inside Out – Scott Webb, Founder, Apple Orchard Consulting
3:45 – 4:45 PM	Round Tables: Marketing; Crypto Trading and Trading Techniques
5:30 PM	Bus leaves for Willis Tower Skydeck and Dinner at Giordano's

Tuesday, October 12

8:00 – 8:30 AM	Continental Breakfast
8:30 – 9:30 AM	Macro Viewpoint with Jim Bianco , President and Macro Strategist, Bianco Research, LLC
9:30 – 10:30 AM	Member Panel Technology to Improve your Practice Efficiency
10:30 – 11:00 AM	Refreshment Break
11:00 – 12:00 PM	Active/Passive Blending Based on The Liquidity Premium – 2021 Founders Award – Garrett H Brookes, CFA, Slingshot Financial
12:00 – 1:00 PM	Lunch
1:00 – 2:00 PM	AI Toolbox - Jim Lee, StratFI – Professional Futurist
2:00 – 2:15 PM	Refreshment Break
2:15 – 3:15 PM	NAAIM Exchange: An open mic, free style, ask your peers discussion about what you've learned while at the conference (or in the business) and what more you would like to know!