

# AGENDA

## Uncommon Knowledge 2024

### Sunday, April 28

4:00 – 6:00 PM Solo Advisor Meeting – Ryan Redfern  
 10:00 AM Golf Tournament – Rosen Shingle Creek Golf Course (tee-off 11:30 AM)  
 7:00 PM NAAIM Welcome Party

### Monday, April 29

7:00 – 8:30 AM NAAIM Board Meeting  
 7:30 – 8:30 AM New Member Welcome Orientation & Breakfast  
 7:30 AM Registration | Sponsor Hall Opens – Continental Breakfast  
 8:30 AM Welcome – Ryan Redfern, NAAIM President  
 8:45 – 9:45 AM **2025 and 2030 -- Today's Opportunities for Active Management** - Charles Stucke, Washington University in St. Louis, MO  
 9:45 - 11:00 AM **How to Use ChatGPT To Create A Strategic Marketing Plan** - Ann Brennan, Consultant, ASMM Digital Marketing – AI Marketing  
 11:00 – 11:30 AM Refreshment Break – Sponsor Hall  
 11:30 – 12:30 PM **Spotting Stock Market Peaks through the Lens of Market Breadth Indicators**- Dean Christians, CMT, Senior Research Analyst, SentimenTrader.com  
 12:30 – 1:45 PM Lunch and Sponsor Introductions  
 1:45 – 2:45 PM **How to Navigate a Regulatory Exam and Avoid/Address Client Complaints in an Ever-Increasing Aggressive Regulatory Environment** - Thomas Giachetti, Esq., Stark & Stark Attorneys at Law  
 2:45– 3:45 PM **The ABC's of Cyber Security Awareness** - James McQuiggan, Security Awareness Advocate, knowbe4.com  
 3:45 – 4:15 PM Refreshment Break – Sponsor Hall  
 4:15 – 5:15 PM **NAAIM Exchange Live!** Experience our monthly get togethers live. Bring a chart or favorite indicator to share in this session - Moderators: Barry Arnold and Ryan Redfern.  
 5:15 – 5:45 PM Break before evening event  
 6:00 – 9:00 PM **Platinum Sponsor Event** - TBA

### Tuesday, April 30

7:30 – 8:30 AM Continental Breakfast – Sponsor Hall  
 8:30 - 9:30 AM **Crypto 101** - Matt Hougan, Chief Investment Officer, Bitwise Asset Management  
 9:30 – 10:45 AM **Abrupt - Speaking to Institutional Investors** - Tony Lombardi, Managing Director, Layton Road Group, LLC  
 10:45 – 11:15 AM Refreshment Break – Sponsor Hall  
 11:15– 12:15 PM **Zero Dated Options: What they are and how to use them to analyze the stock market** – Larry McMillan, Founder, McMillan Analysis Corp.  
 12:15– 1:45 PM Lunch / Annual membership meeting  
 1:45 – 3:00 PM **The Million Dollar Blueprint: A Proven Method to Growing a 7-Figure Firm** – Adam Koos, President, Libertas Wealth Management  
 3:00 – 3:45 PM **Break Outs (concurrent sessions)**  
 a. REX Shares  
 b. **Efficient Expression of Risk, the High Yield Opportunity** – David Selbovitz, Head of Portfolio Strategy & Analytics, MassMutual Wealth Management  
 3:45 – 4:15 PM Refreshment Break – Sponsor Hall

- 4:15 – 5:45 PM **NAAIM Round Tables (Two 35-minute segments). Topics include:**  
1-A. Traditional Marketing  
1-B. Digital Marketing  
2-A. Quantitative & Technical Trading  
2-B. Crypto Currency Trading  
3-A. Financial Planning & Practice  
3-B. Custodians
- 6:30 – 9:00 PM **NAAIM All Conference Event – Sponsor Hall - corn hole.**

### **Wednesday, May 1**

- 7:30 – 8:30 AM Continental Breakfast – Sponsor Hall
- 8:30 - 9:30 AM **Founders Award Winner – Shares winning paper: TBA**
- 9:30 – 10:30 AM **My top 3 tips for financial planning from advisors who have successfully worked it into their practice:** Laura Redfern and Greg Corneille
- 10:30 – 11:00 AM Refreshment Break – Sponsor Hall
- 11:00 – 12:00 PM **Trading Techniques Revealed – NAAIM Member Panel:** Moderator - Matt Spangler
- 12:00 – 1:00 PM **Closing Lunch**
- 1:00 PM **Conference Ends**

### **2024 Uncommon Knowledge Sponsors**



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