

SESSIONS AGENDA

THURSDAY, SEPT. 23

7:00 am – 8:00 am	Breakfast & Exhibit Time – Evergreen Ballroom, 1 st Floor				
8:15 am – 9:00 am	Pacific West Update – Grand Ballroom, 2 nd Floor				
9:00 am – 10:00 am	Questions Great Financial Advisors Ask ... – Grand Ballroom, 2 nd Floor Keynote Speaker: Alan Parris				
10:00 am – 10:15 am	Break				
10:15 am – 12:00 pm	Product Company Round Tables – Grand Ballroom E thru K, 2 nd Floor (four twenty-minute sessions)				
12:00 pm – 1:10 pm	Lunch & Exhibit Time – Evergreen Ballroom, 1 st Floor				
Grand Ballroom	E	F	G	I	J
1:20 pm – 2:10 pm	Smart Prospecting: Identifying and Landing Your Ideal Client Fred Baerenz, Pacific West Top Producer	Structured Products – What’s Available, How Do I Access Them and What Do I Look For? Adam Friedman, Incapital	Research Techniques for Building Portfolios with Mutual Funds & ETFs Rod Ehrlich, VP Advisory Services 1 Hour CFP Credit Pending	Streamline Your Back Office Processes: Unlock Your E-mail’s Full Potential Ryan Hixon, COO & Adrian Peters, IT Coordinator	REITs-Challenging Market or Buying Opportunity? Shawn Smith, VP of Due Diligence
2:20 pm – 3:10 pm	Providing the Ideal Client Experience: The Importance of the Advisor-Administrator Collaboration Fred Baerenz, Pacific West Top Producer	How to Double Your Production with Client Events Paul Karasik, President of The Business Institute	Breaking into the World of Fee-Based 401(k) Patrick Church, Financial Advisor & Dean Rodewald, Vice President, MG Advisory Services (Matrix)	A New Tool for Your Office: Access to Pacific West Account Data and Imaging System Ryan Hixon, Chief Operating Officer	Your Client’s Income Tax Return – Looking for Investment Opportunities Michael Lamoreux, CPA, MS (Taxation) Multop Financial
3:10 pm – 3:25 pm	Break				
3:25 pm – 5:00 pm	Product Company Round Tables – Grand Ballroom E thru K, 2 nd Floor (four twenty-minute sessions)				
5:00 pm	Leadership Summit Group Picture – Grand Staircase				
6:00 pm – 7:00 pm	Evening Reception – Evergreen Ballroom, 1 st Floor				
7:00 pm	Celebration Dinner – Grand Ballroom, 2 nd Floor				

EXHIBITS AND INFORMATION DESK OPEN

FRIDAY, SEPT. 24

7:00 am – 8:00 am	Breakfast & Exhibit Time – Evergreen Ballroom, 1 st Floor				
8:15 am – 9:15 am	Prepare to Meet Thy Boom: Adding Heart to the Brains of Business – Grand Ballroom, 2 nd Floor Guest Speaker: Amy Florian, CEO - Corgenius				
9:15 am – 9:30 am	Break				
Grand Ballroom	E	F	G	I	J
9:30 am – 10:20 am	<p>Estate Tax Repeal: Is it Real? What's the Deal?</p> <p>Weston D. Burnett, JD, LL.M, CFP®</p> <p>Cohen & Burnett, PC</p> <p>1 Hour CFP Credit Pending</p>	<p>Building Out Your Office – How to Navigate Adding Producers</p> <p>Chris Sullivan, Business Development Manager</p>	<p>Practice Management: Software Integration 101</p> <p>Ryan Hixon, Chief Operating Officer</p>	<p>VA Living Benefits: Understanding How Guaranteed Income Riders Work, and How to Use Them</p> <p>Kevin Loffredi, CFP Annuity Intelligence Report</p> <p>1 Hour CFP Credit Pending</p>	<p>Peace of Mind Time Management... and Taming Your Outlook Inbox (Part 1 of 2)</p> <p>Winthrop Jeanfreau, Financial Advisor</p>
10:30 am – 11:20 am	<p>Help! What Do I Say?</p> <p>Amy Florian, CEO of Corgenius</p>	<p>How to Position Third Party Managers in Your Practice</p> <p>Panel: Financial Advisors Bryan Mazza, Jeff Elsworth & Greg Bowen</p> <p>Moderator: Rod Ehrlich, VP Advisory Services</p>	<p>Our Current Economy and Where Are We Headed?</p> <p>Gene Stanaland, PhD, President - GSE, Inc. "The Will Rogers of Economics"</p> <p>1 Hour CFP Credit Pending</p>	<p>Classifying Clients and Cultivating Trust</p> <p>David Miller Co-Founder Pareto Systems</p>	<p>Peace of Mind Time Management... and Taming Your Outlook Inbox (Part 2 of 2)</p> <p>Winthrop Jeanfreau, Financial Advisor</p>
11:20 am – 12:00 pm	Lunch – Grand Ballroom Foyer, 2 nd Floor				
12:00 pm – 1:00 pm	In the Company of Heroes – Grand Ballroom, 2 nd Floor Closing Speaker: Michael Durant, Blackhawk Helicopter Pilot and POW				

INFORMATION DESK OPEN