

Thursday, September 11

7:00 am – 7:45 am	Welcome Session & Breakfast (Leonesa Ballroom)						
7:45 am – 8:30 am	The 10 Big Things Advisors Should Think About: Keynote Speaker - Mark Tibergien, Chief Executive						
8:30 am – 9:00 am	Networking & Exhibit Time						
9:00 am – 11:25 am	Round Table Sessions - Six twenty minute sessions (See Individual Round Table Assignments)					9:00 am – 10:00 am	New Technology: Interfaces to Streamline Your Practice
						10:00 am – 10:15 am - Break	
						10:15 am – 11:15 am	Best Practices Panel: Learn from Your Peers
11:25 am – 11:55 am	Networking & Exhibit Time						
11:55 am – 1:15 pm	Surprisingly Simple, Powerful Ways to Supercharge your Practice: Lunch and Keynote Speaker - Bob Veres, Industry Expert (Leonesa Ballroom)						
1:15 pm – 1:45 pm	Networking & Exhibit Time						
1:45 pm – 2:45 pm	INFORMATION DESK OPEN	Developing an Effective Client Communication Strategy Peter Montoya, Peter Montoya Inc.	The End of the Way We Were? John Mitchell, M & H Economic Consultants	The Tenant in Common Marketplace Today Shanon Ford, President	Albridge: Technology to Manage Your Practice Susie O'Donnell, Albridge Solutions	Using AdvisorWrap for Money Management and DPP Reporting Rod Ehrlich, Vice President Advisory Services	Five Powerful Tools on How Extraordinarily Successful Advisors Continuously Adapt Kevin Cullen, Esq. Coach to High Producing Financial Professionals
		An Introduction to Variable Annuities Vinell M, Pacific West Top Producer	Economic And Housing Market Outlook Richard Moody, Chief Economist Director of Research for Mission Residential	What You Need to Know to Convert to a Paperless Office Ryan Hixon, COO & Sara Mahnke, Compliance Associate	The Truth about Indexed Annuities and How They Fit in your Client's Portfolio Jason Rockman, Creative Marketing	Your Business Structure: A Structure for Success Shanon Ford, President	Integrating Marketing & Service Strategies for Maximum Impact Sarah Dale, Practice Management Expert and Author of Know No Bounds
		Advanced Variable Annuity Strategies & Product Comparisons Vinell M, Pacific West Top Producer	The F-Factor: How to Live a Balanced Life in an Unbalanced World Eric S, Pacific West Top Producer	Managing Equity Risk in a Bear Market: A Panel of Professional Money Managers Moderated by: Rod Ehrlich, Vice President of Advisory Services	Tapping into Trust Market Richard Hageman, Vice President Trust Services Franklin Templeton Bank & Trust	Using Offshore Trusts for Asset Protection Mark C, Pacific West Top Producer	Practice Building Panel: Hear the Experts' Ideas and Come Ready with Your Questions Bob Veres, Kevin Cullen & Sarah Dale
5:10 pm – 5:20 pm	Leadership Summit Group Picture (Leonesa Foyer)						
6:15 pm – 7:00 pm	Evening Reception (Leonesa & Princessa Foyers)						
7:00 pm	Celebration Dinner (Leonesa Ballroom)						

Friday, September 12

7:00 am – 8:00 am	Breakfast (Leonesa Ballroom)							
8:00 am – 8:30 am	Networking & Exhibit Time							
8:30 am–10:55 am	Round Table Sessions - Six twenty minute sessions (See Individual Round Table Assignments)					8:30 am – 9:30 am	Paperwork, Forms, and Audit Preparation: A Walk through the Broker/Dealer	
						9:30 am – 9:45 am – Break		
						9:45 am – 10:45 am	Paperwork & Forms: A Stroll through Advisory Services	
11:00 am–11:30 am	Networking & Exhibit Time							
11:30 am–12:30 pm	What's Your LifeScore? Lunch and Keynote Speaker - Dr. John Rhodes, Jr. , PH.D, CNL Securities Corp., (Leonesa Ballroom)							
12:45 pm–1:10 pm	Networking & Exhibit Time							
1:10 pm – 2:10 pm	INFORMATION DESK OPEN	What 3 Top Producers would do with a Million Dollar Client	Rep Technology Spotlight: A Look at What Two Successful Offices are Using Today	Building a Small Group Practice	Building a Fee Based Practice	Covered Calls: An Income Strategy	Dispelling the Myths and Misconceptions Surrounding VA's and Mutual Funds	
		Joe S, Pacific West Top Producer	Ryan Hixon, Chief Operations Officer	Fred B, Pacific West Top Producer	Rod Ehrlich, Vice President Advisory Services	Robert B, Pacific West Top Producer	John Huggard, Attorney at Law	
						Part 1 of 2		
2:20 pm – 3:20 pm		Inside the Mind of a Portfolio Manager	The Up's and Down's of Running a Large, Integrated Practice	Alternative Solutions: Direct Participation Programs in Your Client's Portfolio	Succession Planning: What You Need to Know Today	Building 401(k) Business: Why You Should Add a 401(k) Arrow to Your Quiver	Dispelling the Myths and Misconceptions Surrounding VAs and Mutual Funds	
		Robert (Bob) Pennell, Principal, Chief Investment Strategist for Appropriate Balance Financial Services	Bill S, Pacific West Top Producer	Shawn Smith, VP of Due Diligence & Dwayne McClain and Brian Pardo, Due Diligence Analysts	Karalyn Carlton, Vice President Marketing	The OnLine 401(k)	John Huggard, Attorney at Law	
						Part 2 of 2		
3:30 pm – 4:30 pm		It's Not What Happens To You, It's What You Do About It: Closing Speaker – W. Mitchell (Leonesa Ballroom)						
4:30 pm – 5:00 pm		Closing Remarks – Passport Drawing (Leonesa Ballroom)						