

AXXCESS PLATFORM CONFERENCE 2022

Make a deeper impression
wherever clients see you.

SEPTEMBER 14TH-15TH

REGISTRATION OPENS JUNE 1ST.

WWW.AXXCESSPLATFORM.COM/CONFERENCE2022



ALILA MAREA BEACH FRONT RESORT

2100 N. COAST HWY 101
ENCINITAS, CA 92024

Our platform is built for the experienced advisor looking to improve their current RIA platform, or as an operational solution for a high caliber professional thinking of going independent and seeking a seamless transition.

CONTACT

6005 Hidden Valley
Road, 290
Carlsbad CA 92011

Axxcess Wealth Management, LLC

An SEC Registered Investment Advisor.

866-217-5607

CONFERENCE HIGHLIGHTS

AXXCESS PLATFORM

September 14th and 15th. Held at the Alila Marea Beach front hotel in North County San Diego.



Jefferson's Bourbon founder Trey Zoeller hosts a discussion about his business, brand value, and marketing efforts that have positioned Jefferson's as one of the world's premier small-batch bourbons. Reception follows with bourbon tastings, pairings, and networking in the ocean front lounge.

**CHANNEL MARKETING IS
A COMPLETE ECOSYSTEM
BUILT TO COMMUNICATE
EFFECTIVELY WITH YOUR
CLIENTS.**

**Learn more about it at the
Axxcess Platform conference**

WELCOME RECEPTION: JOIN US IN SPENDING AN EVENING WITH JEFFERSON'S BOURBON FOUNDER TREY ZOELLER

Wednesday September 14th

9am- Aviara Golf Club

18 hole Arnold Palmer designed Aviara Golf Club in Carlsbad hosts the LPGA KIA Classic annually. Register and play with colleagues and industry vets before the conference reception.

5:30 PM- Welcome Reception

Elevate your communications strategy. Understanding your brand, value proposition, and communications strategy has never been more important. Meet Trey Zoeller, founder of Jefferson's Bourbon, as he discusses the building of his brand, his distillation and production processes, and his incessant pursuit of quality. As an advisor, you must always be thinking about your brand, its management, and the quality of your product.

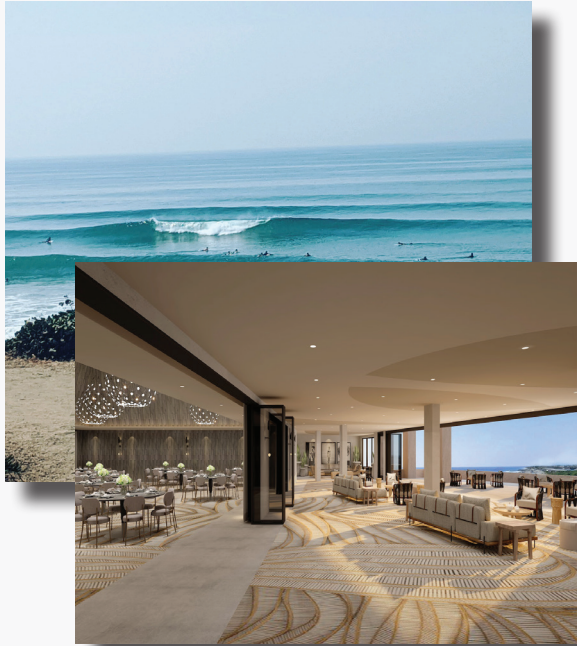
Thursday September 15th

8:30 AM- Kickoff

Leading M & A firms share insights and updates on the state of M & A in our industry. RIA consolidation trends, valuation, transaction types, and deal structure.

MAKE A DEEPER IMPRESSION

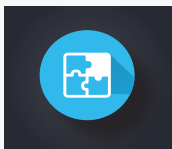
WHEREVER CLIENTS SEE YOU



CONFERENCE SESSIONS

RELEVANT CONTENT UNIQUE TO YOUR BUSINESS

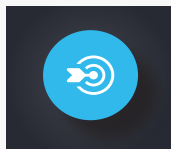
- ⚙ M & A: Avoiding litigation in non-protocol transitions. Transition Case Study analysis: Protocol and non protocol transitions.
- ⚙ Understanding the evolving role of your custodian. Is your custodial firm your partner or your utility company? How are your custodial partners supporting and competing for your business?
- ⚙ Tired of hearing about “Tech-Stack?” Understanding the role of technology in your practice management and client experience models.
- ⚙ Evolving trends in Alternative Asset reporting and accounting. Discussions around performance based fee billing, reporting on direct and held away assets for HNW clients.
- ⚙ SEC Focus- Case studies in exams and enforcement
 - Marketing Rule
 - Reg BI
 - DOL
- ⚙ Move your business upstream.
 - Working with UHN clients.
 - Manager strategy round table.
 - Getting to know Axxcess Platform.
 - Managed account and alternative asset platform.
 - Channel Marketing- tailored content curated across all of your digital marketing channels.
 - Axxcess Allocator
- ⚙ AxxcessLINK- 401k Participant discretionary account management/TAMP integration workshop.



PRACTICE MANAGEMENT CONSULTANTING

Foundational

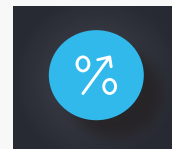
Orion Technology Roadmap
-Redtail Orion acquisition
-Orion Vision
-Orion Planning



MARKETING AND BRAND MANAGEMENT

Implementation

The true differentiator for Channel Marketing is the content. You can communicate your value, while featuring the unique investment views of the strategists that your clients' portfolios are allocated with.



MESSAGE & MEASURE

Amplification

Breakout sessions designed to help you progress towards your overall practice vision, including growth and retention goals, which require specific, attainable, measurable, and timely actions.

AXXCESS PLATFORM CONFERENCE 2022

Make a deeper impression
wherever clients see you.

SEPTEMBER 14TH-15TH

SAVE THE DATE!



Registration coming soon to
www.axxcessplatform.com/Conference2022

For inquiries please contact:
Vanessa@axxcesswealth.com

ALILA MAREA BEACH FRONT RESORT

2100 N. COAST HWY 101
ENCINITAS, CA 92024

CONTACT

6005 Hidden Valley
Road, 290
Carlsbad CA 92011

Axxcess Wealth Management, LLC

An SEC Registered Investment Advisor.

866-217-5607