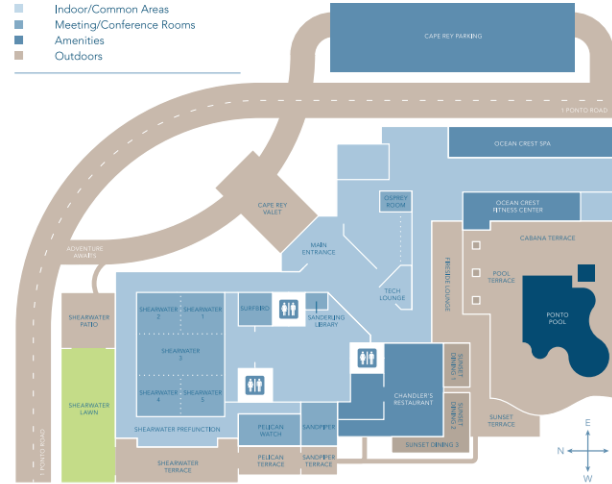


FLOOR MAP

Conference Center & Event Rooms

KEY

- Indoor/Common Areas
- Meeting/Conference Rooms
- Amenities
- Outdoors



THANKS TO OUR SPONSORS!



www.axxcessplatform.com

CONFERENCE POCKET AGENDA

MARCH 6TH, 2020 | CARLSBAD, CA

MAIN SESSION		
TIME	TITLE	LOCATION
7:30-9:00am	Conference Registration and Breakfast	Shearwater Pre-function
9:00-9:45am	Conference Kickoff	Shearwater 3-5
	Keynote: GoPro Rick Loughery, Matthias Giraud “Super Frenchie”	Shearwater 3-5
9:45-10:45am	Practice Management: Perfecting and Elavating the Client Experience Steve Phillips, Pareto Systems presented by First Trust Retirement	Shearwater 3-5
10:45-11:00am	Break	
11:00-11:20am	Practice Management Essentials: CLM Michael Seid	Shearwater 3-5
11:20-11:40am	Practice Management: Beyond DOL Fiduciary Rule IRON Financial and EPIC RPS	Shearwater 3-5
11:40-12:00pm	Practice Management: Understanding Orions Acquisition of Advizr Orion	Shearwater 3-5
12:00-1:00pm	Lunch and Presentations	Shearwater 3-5
12:00-12:30pm	Practice Management Round Table Tony Parkin, Charles Schwab	Shearwater 3-5
12:30-1:00pm	Investment Solutions: Engaging Your Clients through Investment Scenatio Analysis Cory Persson	Shearwater 3-5
1:00-2:15pm	Investment Solutions: Speed Dating	Shearwater 1-5
2:15-3:00pm	Investment Solutions: GS Structured Portfolio Solutions Goldman Sachs	Shearwater 3-5
3:00-3:15pm	Break	
3:15-3:35pm	Practice Management: SharesPost: The New Private Market Kevin Moss, SharesPost	Shearwater 3-5
3:35-4:15pm	Practice Management: Reg BI and the Advisor Mitch Avnet, Compliance Risk	Shearwater 3-5
4:15-4:30pm	Closing Remarks	Shearwater 3-5
5:00-7:00pm	Happy Hour hosted by First Trust Retirement	Shearwater Terrace

BREAKOUT SESSION		
TIME	TITLE	LOCATION
11:00-11:20am	Investment Solutions: Managed Account Sleeves Auour Investments, Joe Hosler	Shearwater 1-2
11:20-11:40am	Client Experience: Dynamically Track Clients using Asset Map Michael Seid	Pelican Watch
11:40-12:00pm	Client Experience: The Portal and Mobile App: Demo Client Persona Michael Seid	Shearwater1-2
12:00-1:00pm	Lunch	Shearwater 3-5
1:00-1:20pm	Investment Solutions: The Next Generation of Global Alt Investing Highmore	Pelican Watch
1:20-1:40pm	Investment Solutions: Hilton Income Strategy Andrew Molloy, Hilton	Pelican Watch
2:15-2:30pm	SME Room: Schedule time with Axxcess	Pelican Watch
2:30-2:45pm	SME Room: Schedule time with Axxcess	Pelican Watch
2:45-2:30pm	SME Room: Schedule time with Axxcess	Pelican Watch
3:00-3:15pm	Break	
3:15-3:30pm	SME Room: Schedule time with Axxcess	Pelican Watch
3:30-3:50pm	Investment Solutions Schedule time with Investment Managers	Pelican Watch
3:50-4:15pm	Investment Solutions Schedule time with Investment Managers	Pelican Watch