

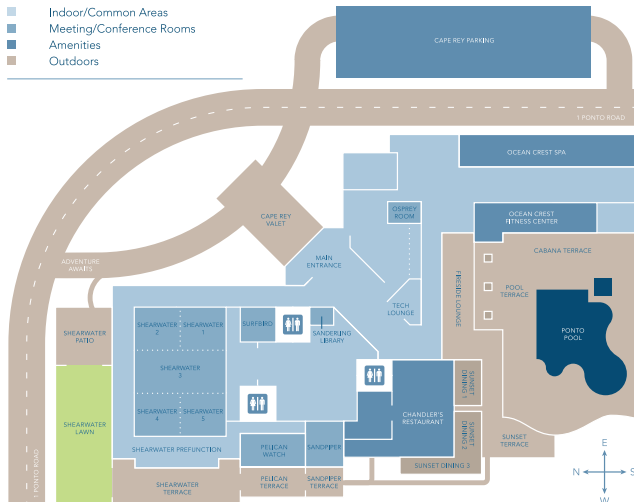
FLOOR MAP

Conference Center & Event Rooms



KEY

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



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AXXCESS ANNUAL CONFERENCE 2020

March 5-6, 2020

MAIN SESSION			
TIME	TRACK	SESSION	LOCATION
8:00-9:00am		Conference Registration and Breakfast	Shearwater Pre-function
9:00-9:45am		Conference Kickoff <i>Michael Seid</i>	Shearwater 3-5
9:00-9:35am		Keynote with GoPro <i>Rick Loughery, Matthias Giraud "Super Frenchie"</i>	
9:35-9:45am		Axxcess Platform Roadmap <i>Michael Seid, Cory Persson</i>	
9:45-10:45am	Practice Management	Perfecting and Elevating the Client Experience <i>Steve Phillips, Pareto Systems presented by First Trust Retirement</i>	Shearwater 3-5
10:45-11:00am	Break	Break	
11:00am-12:00pm	BREAKOUT SESSIONS		BREAKOUT SESSIONS
11:00-11:20am	Practice Management	Practice Management Essentials <i>Michael Seid</i>	Shearwater 3-5
11:20-11:40am	Practice Management	Beyond DOL Fiduciary Rule <i>IRON Financial and EPIC RPS</i>	Shearwater 3-5
11:40am-12:00pm	Client Experience	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	Practice Management Round Table <i>Tony Parkin, Charles Schwab</i>	Shearwater 3-5
12:30-1:00pm	Investment Solutions	Engaging Your Clients through Investment Scenario Analysis <i>Cory Persson, CFA</i>	Shearwater 3-5
1:00-2:15pm	Investment Solutions	Speed Dating <i>Investment Managers</i>	Shearwater 1-5
2:15-3:00pm	Investment Solutions	GS Structured Portfolio Solutions <i>Goldman Sachs</i>	Shearwater 3-5
3:00-3:15pm	Break	Break	
3:15-3:35pm	Practice Management	Sharespost: The New Private Market <i>Kevin Moss, Sharespost</i>	Shearwater 3-5
3:35-4:15pm	Practice Management	Reg BI and the Advisor <i>Mitch Avnet, Compliance Risk Concepts</i>	Shearwater 3-5
4:15-4:30pm		Closing Remarks	Shearwater 3-5
5:00-7:00 pm		Happy Hour hosted by First Trust Retirement	Shearwater Terrace

BREAKOUT SESSION			
TIME	TRACK	SESSION	LOCATION
10:45-11:00am	Break	Break	
11:00am-12:00pm		BREAKOUT SESSIONS	
11:00-11:20am	Investment Solutions	Managed Account Sleeves <i>Auour Investments</i>	Shearwater 1-2
11:20-11:40am	Client Experience	Dynamically Track Clients using Asset Map <i>Michael Seid</i>	Shearwater 1-2
11:40am-12:00pm	Client Experience	The Portal and Mobile App: Demo Client Persona <i>Michael Seid</i>	Shearwater 1-2
12:00-1:00pm		Lunch and Presentations	
1:00-1:40pm		Manager Deep Dive Sessions	
1:00-1:20pm	Investment Solutions	The Next Generation of Global Alt Investing <i>Highmore</i>	Pelican Watch
1:20-1:40 pm	Investment Solutions	Hilton Income Strategy <i>Andrew Molloy, Hilton</i>	Pelican Watch
3:00-3:15pm	Break	Break	