

## TUESDAY, OCTOBER 18

12:00–1:00 pm	Operations Committee Lunch
1:00–4:00 pm	Operations Committee Meeting
6:00–8:00 pm	Reception, by Platinum Sponsor, <i>Fifth Third Institutional Trust &amp; Custody</i>

## WEDNESDAY, OCTOBER 19

8:00–9:00 am	Breakfast, by Silver Sponsor, <i>CAPIS</i>		
9:00–10:00 am	<i>Accutech - State of the Union, Adam Unger</i> , President, Accutech Systems		
10:00–10:30 am	Introductions of Vendors / Logistics		
10:30–11:00 am	Break, by Bronze Sponsor, <i>Federated Hermes</i>		
11:00 am–12:00 pm	<i>Markets Are Changing, Are You Transforming With Them?, Mike Tropeano</i> , Broadridge Consumer demands and market dynamics are causing wealth management firms to re-think how they are doing business. This includes changing their business model and expanding the services they offer to better compete with new market participants.		
12:00–1:00 pm	Lunch, by Silver Sponsor, <i>Chicago Clearing</i>		
1:00–2:00 pm	<i>Crypto 101 - An Introduction*, Jody Mettler</i> , President, BitGo Trust		
2:00–2:30 pm	Break		
3:00–4:00 pm	Executive Track	Investment Track	Operations Track
	<i>Current State of the Economy and an Outlook for the Fixed Income Markets, Alan Kort</i> , CFA, Senior Fixed Income Portfolio Manager, MainStreet Advisors	<i>Best Practices for Onboarding New Tools and Technologies, Addepar</i>	<i>Cheetah Configurations, Building Blocks to a Solid Foundation, Iris Lewis-Beasley and Kelly Waugh</i> , Wealth Management Consultants, Accutech Systems
4:00–5:00 pm	Executive Track	Investment Track	Operations Track
	<i>Obtaining Optimal Risk Adjusted Revenue, Donald F. Moore, Jr.</i> CEO, Bearmoor, LLC	<i>Dazzle Prospects with Accutech's New Proposal Generator, Scott Meyer</i> , Product Manager, Accutech Systems	<i>Improved Decision Making through Data*, Craig Bushong</i> , Senior Solutions Architect, Accutech Systems
6:00–8:00 pm	Dinner, by Diamond Sponsor, <i>Broadridge Financial Solutions, Inc.</i>		
8:00–10:00 pm	Cornhole & Cocktails, by Diamond Sponsor, <i>R&amp;T / Total Bank Solutions</i>		

## THURSDAY, OCTOBER 20

7:00–8:30 am	Breakfast		
8:30–9:30 am	KEYNOTE: <i>One Step at a Time</i> , <b>Josh Bleill</b> , Inspirational Speaker, by Gold Sponsor, <i>First Rate, Inc.</i> An inspirational speaker who touches on the highs and lows, the challenges, and the motivation to keep moving forward – One Step at a Time.		
9:30–10:30 am	<i>The Art Of Creating Emotionally Connected Clients</i> , <b>Brendan Frazier</b> , Wired Planning		
10:30–11:00 am	Break, by Bronze Sponsor, <i>FCI Advisors</i>		
11:00 am–12:00 pm	Executive Track	Investment Track	Operations Track
	<i>Trends, Tailwinds and Challenges</i> , <b>Michael Dixon</b> , Director of Organizational Development, Pohl Consulting & Training, Inc.	<i>Cash Alternatives in a Rising Rate Environment</i> , <b>Kevin Bannerton</b> , Partner at TBS and the Head of Product	<i>Gain Efficiencies through Cheetah Imports</i> , <b>Iris Lewis-Beasley</b> and <b>Jerry Gillespie</b> , Wealth Management Consultants, Accutech Systems
12:00–1:00 pm	Lunch, by Silver Sponsor, <i>New Edge Capital Group/Mid Atlantic American Trust</i>		
1:00–2:00 pm	Executive Track	Investment Track	Operations Track
	<i>80% of a company's challenges are people related, Culture Index helps clarify and solve people challenges</i> , <b>Patrick McHale</b> , Culture Index, LLC	<i>Top 10 Insights To Master The Human Side of Advice</i> , <b>Brendan Frazier</b> , Founder, Wired Planning	<i>Hot Topics in Trust Regulation*</i> , <b>Becky Kelly &amp; Roger Pond</b> , Fiduciary Education Center
2:00–3:00 pm	<i>The Practical Problems with ESG in Wealth Management &amp; What Can be Done About Them</i> <b>Kendrick Wakeman, CFA</b> , First Rate Ventures & Managing Partner, qSpur Consulting		<i>How to Gain Agility</i> , <b>Valerie Hurwitz</b> , Manager, Development, Accutech Systems
3:00–3:30 pm	Break, by Bronze Sponsor, <i>MainStreet Advisors</i>		
3:30–5:00 pm	Executive Track	Investment Track	Operations Track
	<i>Crypto 201: How Do We Use It*</i> , <b>Jody Mettler</b> President, BitGo Trust	<i>Cheetah Investment Functionality</i> <b>Matt Garrett</b> and <b>Scott Meyer</b> , Product Managers, Accutech Systems	Cheetah Client Panel, <b>Various Clients</b> and <b>Accutech Staff</b>

## FRIDAY, OCTOBER 21

7:30–8:30 am	Breakfast
8:30–9:30 am	<i>Taxes*, Doug Hart</i> , Managing Partner, Trust Processing Solutions, and <i>Tim Varner</i> , Operations Manager, Wolters Kluwer CCH Trust US
9:30–9:45 am	Break
9:45–10:45 am	<i>Topics in Trust &amp; Wealth Management*, Becky Kelly and Roger Pond</i> , Fiduciary Education Center