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**WEDNESDAY, MAY 16TH**

12:00 pm - 8:00 pm	Check In & Registration	South Loggia
12:00 pm - 2:00 pm	Networking Lunch ( <i>Advisors Only</i> )	Mediterranean Courtyard
2:00 pm - 4:00 pm	<b>PRE-CONFERENCE SESSION</b>	Gold Room
2:00 pm - 2:10 pm	Welcome and Introductions <b>Mike Fardy</b> , National Sales Manager, FlexShares	
2:10 pm - 2:45 pm	Factoring in Behavior <b>Michael Natale</b> , Head of Intermediary Distribution, FlexShares	
2:45 pm - 3:45 pm	Thoughts on 2018: "3s" Are Wild <sup>CFP   I-W</sup> <b>Mark Carlson</b> , Senior Investment Strategist, FlexShares	
3:45 pm - 4:00 pm	Innovation, Implementation and Sustainability <b>Lori Missig</b> , Business Development Executive, FlexShares	
5:30 pm - 6:30 pm	Cocktail Reception	Mediterranean Ballroom
6:30 pm - 8:30 pm	<b>WELCOME DINNER &amp; SPEAKER</b> <b>Maria Contreras-Sweet</b> , Former Head of the U.S. Small Business Administration, Founder, ProAmérica Bank, Former Secretary of California's Business, Transportation and Housing Agency <i>Interviewed by: Lillian Peros</i> , Regional Vice President, Eastern Region, Fidelity Clearing & Custody Solutions	Venetian Ballroom

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**THURSDAY, MAY 17TH**

7:00 am - 6:00 pm	Registration / Information Desk	South Loggia
7:00 am - 8:00 am	Breakfast	Mediterranean Ballroom
8:00 am - 9:10 am	<b>GENERAL SESSION</b> Lessons in Leadership: The Future for Independent Advisors <sup>I-W</sup> <i>Moderated by: Sterling Shea</i> , Global Head, Dow Jones Wealth & Asset Management <b>Lisa Dolly</b> , CEO, Pershing, a BNY Mellon company <b>Kate Healy</b> , Head of Generation Next, TD Ameritrade	Venetian Ballroom
9:10 am - 9:25 am	Refreshment Break	Mediterranean Ballroom

Attendees of the Barron's Top Independent Women Advisors Summit can apply for 7 CE CFP credits & 8 CE hours (toward CIMA®/CIMC®/CPWA® designations). Please have your badge scanned at the door of every session.

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**THURSDAY, MAY 17TH**

9:25 am - 10:15 am	<b>CONCURRENT BREAKOUTS</b>	
	<p>Will to Win: Igniting New Business Strategies for Growth  <i>Moderated by:</i> <b>Jody Johnson</b>, Founder, NaturaLead  <b>Debra Brede</b>, D.K. Brede Investment Management Company, Inc  <b>Lee DeLorenzo</b>, United Asset Strategies, Inc.</p>	Magnolia Room
	<p>Factor Investing: How Not to Be Dumb About Smart Beta <sup>CFP   I-W</sup>  <b>Meggan Friedman</b>, Senior Investment Strategist, Northern Trust  <b>Michael Natale</b>, Head of Distribution, FlexShares</p>	Gold Room
10:15 am - 10:30 am	Networking Break	Mediterranean Ballroom
10:30 am - 11:20 am	<b>CONCURRENT BREAKOUTS</b>	
	<p>Human Capital: Attracting Talent to Fit Your Company Culture  <i>Moderated by:</i> <b>Michelle Lynch</b>, Vice President, Raymond James  <b>Heather Ettinger</b>, Fairport Asset Management  <b>Shannon Eusey</b>, Beacon Pointe Advisors, LLC  <b>Barbara Hudock</b>, Hudock Capital Group, LLC</p>	Magnolia Room
	<p>Avoiding Portfolio Isolationism: International Investing          Opportunities in Today's Market <sup>CFP   I-W</sup>  <b>Cynthia Chamberlayne</b>, National Director &amp; Portfolio Specialist,          Davis Advisors</p>	Gold Room
11:20 am - 11:35 am	Refreshment Break	Mediterranean Ballroom
11:35 am - 12:25 pm	<b>GENERAL SESSION</b>	Venetian Ballroom
	<p>Fixed Income from Forgotten Sources <sup>CFP   I-W</sup>  <i>Moderated by:</i> <b>Karen Cashen</b>, VP Advisor Services Marketing, Charles Schwab &amp; Co.  <b>Michelle Russell-Dowe</b>, Head of Securitized Credit, Schroders  <b>Tara Torrens</b>, Partner, Capital Research, American Funds, part of Capital Group</p>	
12:25 pm - 1:30 pm	<b>LUNCH</b>	Venetian Ballroom
1:30 pm - 1:45 pm	Refreshment Break	Mediterranean Ballroom

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**THURSDAY, MAY 17TH**

1:45 pm - 2:35 pm	<b>CONCURRENT BREAKOUTS</b>	
	Mergers and Acquisitions: What Works and Why <i>Moderated by: Annie Tronoski</i> , Managing Director, Park Sutton Advisors <b>Barbara Archer</b> , HighTower <b>Deborah Stavis</b> , Stavis & Cohen Financial <b>Lori Van Dusen</b> , LVW Advisors	Magnolia Room
	Outlook on Private Equity: Coming Off the Strongest Year in a Decade <sup>CFP   I-W</sup> <b>Kurt Nelson</b> , Partner, SummerHaven Investment Management	Gold Room
2:35 pm - 2:50 pm	Networking Break	Mediterranean Ballroom
2:50 pm - 3:40 pm	<b>CONCURRENT BREAKOUTS</b>	
	Marketing & Events: Appealing to Your Ideal Client Market <i>Moderated by: Ani Yessaillian</i> , Principal & Founder, Excella <b>Carolyn Donnelly</b> , CIBC Atlantic Trust <b>Sarah Mouser</b> , Cassaday & Company, Inc. <b>Ali Phillips</b> , Obermeyer Wood Investment Counsel, LLLP	Magnolia Room
	Delivering Priceless Value: How to Grow Your Practice in a Strict Fiduciary Environment <b>Wassan Kasey</b> , National Speaker, American Funds, part of Capital Group	Gold Room
3:40 pm - 4:00 pm	Refreshment Break	Mediterranean Ballroom
4:00 pm - 5:00 pm	<b>GENERAL SESSION</b> A Conversation with Pilar <b>Pilar Guzmán</b> , Editor in Chief, Condé Nast Traveler <i>Interviewed by: Tricia Kasner</i> , Managing Director, Dow Jones Wealth & Asset Management	Venetian Ballroom
5:00 pm - 6:00 pm	Cocktail Reception	Mediterranean Ballroom

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**FRIDAY, MAY 18TH**

7:00 am - 11:00 am	Registration / Information Desk	South Loggia
7:00 am - 8:00 am	Breakfast	Mediterranean Ballroom

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**FRIDAY, MAY 18TH**

8:00 am - 8:50 am	<b>GENERAL SESSION</b> Leading High Performing Teams <b>Tsedal Neeley</b> , Associate Professor in the Organizational Behavior Unit, Harvard Business School	Venetian Ballroom
8:50 am - 9:00 am	Refreshment Break	Mediterranean Ballroom
9:00 am - 9:50 am	<b>CONCURRENT BREAKOUTS</b>  Identifying Antiques for Insurance, Retirement & Estate Planning <sup>CFP   I-W</sup> <b>Lori Verderame, Ph D.</b> , Antiques Appraiser, Author, Award-winning TV Personality	Magnolia Room
	Deepening Connectivity and Attracting New Clients With Responsible Investing <i>Moderated by:</i> <b>Lenore Reiner</b> , Responsible Investment Strategy Specialist, Eaton Vance Management <b>Cary Carbonaro</b> , United Capital <b>Kim Orth</b> , Ameriprise Financial <b>Ylisa Sanford</b> , Ameriprise Financial	Gold Room
9:50 am - 10:00 am	Refreshment Break	Mediterranean Ballroom
10:00 am - 10:50 am	<b>CONCURRENT BREAKOUTS</b>  The Digital Era: Leveraging Technology to Perfect the Client Experience <sup>I-W</sup> <i>Moderated by:</i> <b>Leigh Emery</b> , Chief Compliance Officer, Dynasty Network <b>Margaret Casey</b> , Durbin Bennett Private Wealth Management, LLC <b>Laila Pence</b> , Pence Wealth Management <b>Susan Riley-Hayes</b> , Ameriprise Financial	Magnolia Room
	Tax Reform: Some of the Ways It May Affect Affluent Individuals <sup>CFP   I-W</sup> <b>Mike Cogswell</b> , Founder, Command Financial Consulting LLC, Sponsored by PIMCO	Gold Room
10:50 am - 11:00 am	Refreshment Break	Mediterranean Ballroom
11:00 am - 11:45 am	<b>GENERAL SESSION</b> Visual Intelligence: The Art of Perception <b>Amy Herman</b> , Founder and President, The Art of Perception, Inc.	Venetian Ballroom