



# Barron's Independent Women Summit

May 15-17, 2019 | The Breakers, Palm Beach



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## WEDNESDAY, MAY 15, 2019

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|-------------------------|-------------------------------------------------------------------------------------|
| 11:30 AM – 8:00 PM      | <b>REGISTRATION</b>                                                                 |
| Mediterranean Ballroom  |                                                                                     |
| 12:00 PM – 2:00 PM      | <b>NETWORKING LUNCH</b>                                                             |
| Mediterranean Courtyard | Advisors Only                                                                       |
| 5:30 PM – 6:30 PM       | <b>COCKTAIL RECEPTION</b>                                                           |
| Mediterranean Ballroom  |                                                                                     |
| 6:30 pm – 8:30 PM       | <b>WELCOME DINNER</b>                                                               |
| Venetian Ballroom       | Braving Innovation from Our Strengths<br><b>Lisa Sun</b> , CEO & Founder, Gravitias |

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## THURSDAY, MAY 16, 2019

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|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8:00AM – 6:00 PM       | <b>REGISTRATION</b>                                                                                                                                                                                                                                                                                                                                                                                   |
| Mediterranean Ballroom |                                                                                                                                                                                                                                                                                                                                                                                                       |
| 8:00 AM – 9:00 AM      | <b>BREAKFAST</b>                                                                                                                                                                                                                                                                                                                                                                                      |
| Mediterranean Ballroom |                                                                                                                                                                                                                                                                                                                                                                                                       |
| 9:00 AM – 10:00 AM     | <b>GENERAL SESSION</b>                                                                                                                                                                                                                                                                                                                                                                                |
| Venetian Ballroom      | Lessons in Leadership: The Future for Independent Advisors<br><b>Kate Healy</b> , Managing Director, Next Generation, TD Ameritrade<br><b>Jalina Kerr</b> , SVP, Advisor Services Integration and Core Segment, Charles Schwab & Co., Inc.<br><b>Lillian Peros</b> , Regional Vice President, Fidelity Investments<br><b>Sterling Shea</b> , Global Head of Wealth & Asset Management, Barron's Group |
| 10:00 AM – 10:10 AM    | <b>REFRESHMENT BREAK</b>                                                                                                                                                                                                                                                                                                                                                                              |
| Mediterranean Ballroom |                                                                                                                                                                                                                                                                                                                                                                                                       |

I-W

Attendees of the Barron's Independent Women Summit can apply for 4 CE CFP credits & 6 CE hours (towards CIMA / CIMC / CPWA designations). Please scan your badge at the door of the session.

Issued 5/8/2019 at 12:42:03 PM



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10:10 AM – 11:00 AM

Magnolia Room

## BREAKOUTS

Exceptional Experience: Creating Unique & Defined Value For Your Clients

**Karen Altfest**, Altfest Personal Wealth Management

**Vicki Haak**, Ameriprise Financial

**Abby Salameh**, Hightower Advisors

Moderator: **Shannon Reid**, Senior Vice President, Regional Director,  
Raymond James Financial Services

Gold Room

Addressing Clients Wants vs. Needs: Navigating the Current Credit Cycle  
and Growing Your Business for Long-Term Success

**Jennifer McGrath**, Director, Sales, MFS Investment Management

**Brad Rutan**, Managing Director, Investments, MFS Investment  
Management

CFP I-W

11:00 AM – 11:10 AM

Mediterranean Ballroom

## REFRESHMENT BREAK

11:10 AM – 12:00 PM

Magnolia Room

## BREAKOUTS

Success and Failure in Business Growth: What Works and Why?

**Patti Brennan**, Key Financial, Inc.

**Allison Felix**, Cassaday & Company, Inc.

Moderator: **Valerie Newell**, Mariner Wealth Advisors

I-W

Gold Room

Preparing to Serve the Tsunami of Incoming Retirement Assets

**Susan Czochara**, Practice Lead, Retirement Solutions, Northern Trust  
Asset Management

CFP I-W

12:00 PM – 12:10 PM

Mediterranean Ballroom

## REFRESHMENT BREAK

12:10 PM – 1:10 PM

Venetian Ballroom

## LUNCH

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# Barron's Independent Women Summit

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1:10 PM – 2:00 PM  
Venetian Ballroom

## GENERAL SESSION

Marketing and Managing Your Brand

**Laura Gregg**, Senior Vice President, Director of Client Development, FlexShares

**Dee Mc Laughlin**, Senior Vice President, Global Brand, Capital Group, home of American Funds

**Katie Rooney**, Chief Marketing Officer, USCF

Moderator: **Barbara Hudock**, Hudock Capital Group, LLC

2:00 PM – 2:10 PM  
Mediterranean Ballroom

## REFRESHMENT BREAK

2:10 PM – 3:00 PM  
Magnolia Room

## BREAKOUTS

M&A Trends in 2019

**Cheryl Bicknell**, Mariner Wealth Advisors

**Steve Levitt**, Park Sutton Advisors

**Annie Tronoski**, Park Sutton Advisors

Gold Room

Playing Both Sides: How to Support the Client and the Attorney Through the Estate Planning Business

**Leslie Geller**, Wealth Strategist - High Net Worth, Capital Group, home of American Funds

CFP I-W

3:00 PM – 3:10 PM  
Mediterranean Ballroom

## REFRESHMENT BREAK

3:10 PM – 4:00 PM  
Magnolia Room

## BREAKOUTS

Managing Human Capital for Peak Team Performance

**Brittain Prigge**, Balentine

**Lisa van Wallegem**, Maximai Partners

Moderator: **Karen Dekker**, Vice President, Human Resources, Ameriprise Financial

Gold Room

Commodities in the News Today: Oil & Copper

**Ryan Katz**, National Sales Director, USCF

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4:00 PM – 4:10 PM

Mediterranean Ballroom

## REFRESHMENT BREAK

4:10 PM – 5:00 PM

Venetian Ballroom

## GENERAL SESSION

Lessons in Entrepreneurship, Brand Creation, and Team Motivation

**Julie Rice**, Partner at WeWork, SoulCycle Co-Founder

Interviewer: **Alison Rooney**, Senior Manager, Content Development, Dow Jones Wealth & Asset Management

5:00 PM – 6:00 PM

Mediterranean Ballroom

## COCKTAIL RECEPTION

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### FRIDAY, MAY 17, 2019

8:00 AM – 11:00 AM

Mediterranean Ballroom

## REGISTRATION

8:00 AM – 9:00 AM

Mediterranean Ballroom

## BREAKFAST

9:00 AM – 9:50 AM

Venetian Ballroom

## GENERAL SESSION

The Playbook of World Class Advisors

**Susan Kay**, Vice President, Business Development Consultant, MFS Fund Distributors

I-W

9:50 AM – 10:00 AM

Mediterranean Ballroom

## REFRESHMENT BREAK

10:00 AM – 10:50 AM

Venetian Ballroom

## GENERAL SESSION

Winning Her Business

**Bridget Brennan**, CEO, Female Factor Corporation

10:50 AM – 11:00 AM

Venetian Ballroom

## CLOSING REMARKS

**Tricia Kasner**, Managing Director, Wealth & Asset Management, Barron's Group

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