SSG Conference Agenda for 2019

WEDNESDAY, APRIL 24

2:00 – 3:00 p.m. – Concurrent Breakout/Training/ Technology Demo Sessions

- "A Technology Case Study," presented by Bridge Technology, Scripps Ballroom 1
- SSG Training Session, Scripps Ballroom 2
- Technology Demo Sessions
  - eMoney Advisor and Portfolio Pathway
  - Morningstar and YCharts, La Jolla Shores Room

3:15 – 4:15 p.m. – Concurrent Breakout/Training/ Technology Demo Sessions

- "Making the Most of the Qualified Business Income Deduction," Sheryl Rowling, Principal, Rowling & Associates, *CFP CE Eligible*, Scripps Ballroom 1
- SSG Training Session (Repeat of 2:00 p.m. Session), Scripps Ballroom 2
- Technology Demo Sessions
  - Redtail and MoneyGuide, Canyon Room
  - Black Diamond and Totum Risk, La Jolla Shores Room

4:30 – 5:30 p.m. – Keynote Presentation, Ballroom CDE

- "Modern Marketing Portfolio Theory – A Framework for Scalable Growth," Tina Powell, CEO, C-Suite Social Media

5:30 – 7:30 p.m. – Opening Night Reception in the Exhibit Areas

THURSDAY, APRIL 25

7:00 – 8:00 a.m. – Breakfast in the Exhibit Areas

7:00 – 7:55 a.m. – Early Morning Session

- "Bonds Over Breakfast: The State of Fixed Income," Venk Reddy, CEO, Zeo Capital Advisors, *CFP CE Eligible*, Scripps Ballroom 1

8:00 – 8:30 a.m.- SSG Opening Session with Dan Skiles, President of SSG, Ballroom CDE

8:30 – 9:30 a.m. – "CEO Technology Insights Panel Session with:

- Aaron Klein, CEO of Riskalyze
- Ed O'Brien, CEO of eMoney Advisor
- Brian McLaughlin, CEO of Redtail

9:30 – 10:00 a.m. – Morning Refreshment Break in Exhibit Areas

10:00 – 11:00 a.m. – Concurrent Breakout Sessions

- "Create Client Loyalty Across Generations by Understanding Family Dynamics," Jean Dunn, Vice President, T. Rowe Price, *CFP CE Eligible*, Scripps Ballroom 1
- "Divorce and Death: Planning When Bad Goes to Worse, Evelyn M. Zohlen, President, Inspired Financial, and Mark L. Prendergast, Director of Strategies, Inspired Financial, Scripps Ballroom 2
- Technology Demo Sessions, Canyon Room
    - BlueLeaf and PreciseFP
- "Ask the Experts on NetX360 and NetXInvestor," SSG Associates to Answer Your Questions, La Jolla Cove Room

11:15 – 12:15 p.m. – Keynote Presentation, Ballroom CDE

- Mark Eibel, Director, Investment Strategies for Russell Investments,

12:15 – 1:40 p.m. – Lunch Buffet Outside on the Patio

1:45 – 2:45 p.m. – Concurrent Breakout Sessions

- "Understanding Others' Influence on Client Money Behaviors," Sarah Stanley Fallaw, Ph.D. , President of DataPoints, Scripps Ballroom 1
- The Value Framework: Increasing Your Firm's Enterprise Value – Profitability, Growth and Sustainability of Profits," Johann Schneider, Senior Director, Russell Investments, Scripps Ballroom 2
- Technology Demo Sessions
  - Riskalyze and NEXA Insights
  - RightCapital and 55ip, La Jolla Shores Room
- "Ask the Experts on New Accounts and Transfers," SSG Associates to Answer Your Questions, La Jolla Cove Room

3:00 – 4:00 p.m. – Concurrent Breakout Sessions

- "How Smart Leaders Leverage Technology Infrastructure to Fuel Growth, Efficiency, and Firm Valuation," Wes Stillman, CEO, RightSize Solutions, and Michelle Jacko, CEO, Core Compliance & Legal Services, Scripps Ballroom 1
- "From Tolerance to Solution: Latest Research and Practical Examples," Shawn Brayman, CEO, PlanPlus Global Inc., CFP CE Eligible, Scripps Ballroom 2
- Technology Demo Sessions
  - Advyzon and BillFin by Redi2 Technologies, Canyon Room

- “Ask the Experts on Cashiering and Money Movement,” SSG Associates to Answer Your Questions, La Jolla Cove Room

4:00 – 4:30 p.m. – Afternoon Refreshment Break in the Exhibit Areas

4:30 – 5:30 p.m. – Keynote Presentation, Ballroom CDE

- Mike Scioscia, Los Angeles Angels Manager, 2000 – 2018, Los Angeles Dodgers Player for 12 years, including the 1981 and 1988 World Series Teams

5:30 – 7:30 p.m. – Thursday Evening Reception in the Exhibit Areas

FRIDAY, APRIL 26

7:00 – 8:00 a.m. – Breakfast in the Exhibit Areas

8:00 – 8:30 a.m – “The Cash Landscape and Growing AUM,” Brad Wahal, AVP, StoneCastle Cash Management, Ballroom CDE

8:30 – 9:30 a.m. – Keynote Presentation, Ballroom CDE

- “The Six Dimensions of Client Service,” Bob Veres, Publisher, Inside Information

9:30 – 10:00 a.m. – Morning Refreshment Break in Exhibit Areas

10:00 – 12 noon – Ethics Session, Scripps Ballroom 1

- A two-hour interactive seminar that fulfills the CFP Board of Standard’s Ethics requirement,
- “Ethics in 2019’s World,” Peggy Doviak, Ph.D., CFP, founder, D.M. Wealth Management, Inc.

10:00 – 11:30 a.m.–Technology Session, Scripps Ballroom 2

- “Leveraging Technology Throughout the Client Lifecycle,” Brandon Held, eMoney Advisor, CFPCE Eligible