SESSIONS

SUNDAY SEPT 8TH - 08/09/2019

Wealth/Stack

September 8 - 10, 2019
The Scottsdale Plaza Resort
Scottsdale, Arizona

Welcome Remarks

2:30pm - 2:40pm

Participants

Presenter: John Swolfs - CEO, Inside ETFs

Mergers, Acquisitions and Succession Planning: What You Need to Know to Succeed

2:40pm - 3:20pm

Goldman Sachs made news recently with the acquisition of United Capital, but the truth is, the industry has been consolidating for some time. This in-depth session will walk you through what to look for when acquiring or merging a business, how to make your practice look more attractive to potential suitors, how to use technology to prepare for an acquisition, and much more.

Participants

Moderator: Alex Chalekian - Founder & CEO, Lake Avenue Financial

Panelist: Ken Auspaker - Managing Director – M&A, Financial Technology & Asset Management, Evercore

Panelist: David Grau, Sr., JD - President and Founder, FP Transitions

Panelist: Kirsten Petras - Executive Director - Sales, Oak Street Funding

Panelist: Kristen Schmidt - Founder & President, RIA Oasis

The New Influencers: Building Your Advisor Brand on Social Media

3:20pm - 4:00pm

Join four of the most influential young advisors in America, as they lead a hands-on interactive discussion about how you can build your brand and grow your business. Whether you're using Facebook, LinkedIn, Instagram, Twitter, blogs or podcasts, you'll leave with new ideas to take your influence to the next level.

Participants

Moderator: Douglas Boneparth - President, Bone Fide Wealth

Panelist: Justin Castelli - Founder & Financial Advisor, RLS Wealth Management

Panelist: Nina O'Neal - Partner & Investment Advisor, Archer Investment Management

Panelist: Tyrone Ross Jr. - CEO & Financial Consultant, 401

Panelist: Dasarte Yarnway - Founder & Financial Advisor, Berknell Financial Group

Networking Break – Location: Foyer

4:00pm - 4:30pm

An Economist Walks Into a Brothel ...

4:30pm - 5:00pm

Renowned journalist, economist and author Allison Schrager walks you through everything you need to know about risk management, sharing how you can apply these same insights beyond traditional finance, impacting all aspects of life.

Participants

Interviewer: Blair duQuesnay - Investment Advisor Representative, Ritholtz Wealth Management

Presenter: Allison Schrager - Economist, Journalist at Quartz, & Co-Founder, LifeCycle Finance Partners

Wealth/Stack Opening Keynote: Technology as a Catalyst for Measurable Growth

5:00pm - 5:30pm

Every advisor technology firm in this business promotes the ability to save you time, create efficiencies, drive productivity, improve client satisfaction and ultimately increase revenue. But very few are able to show you how. In this keynote address, Orion CEO Eric Clarke will leave you with the insight and action steps needed to take your tech stack from a cost you have to justify to a true catalyst for success, as he shares real-life examples of how Orion's clients have used their tech to drive measurable growth.

Participants

Presenter: Eric Clarke - CEO, Orion Advisor Solutions

Welcome Reception: Sunday Night Football – Location: Cypress Court

5:30pm - 7:00pm

Wealth/Stack welcomes our guests to a massive outdoor tailgate party, for the first Sunday night primetime game of the NFL season. Watch the Pats and Steelers go head to head with your peers and colleagues while enjoying all the traditional tailgate festivities.

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3:00PM	**3:20pm** - The New Influencers: Building Your Advisor Brand on Social Media
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5:00PM	**5:00pm** - Wealth/Stack Opening Keynote: Technology as a Catalyst for Measurable Growth **5:30pm** - Welcome Reception: Sunday Night Football – Location: Cypress Court

SESSIONS

MONDAY SEPT 9TH - 09/09/2019

Wealth/Stack

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Registration Opens

7:30am - 8:00am

Breakfast Workshop: The Battle of the ETF Pundits

8:00am - 8:50am
Breakfast Workshop 1 – Location: Grand Ballroom

The world's leading ETF pundits have been in battles before, but we're taking it to the next level: We're taking ETFs out of the conversation. Join these nerds as they address the biggest trends in investing, covering a range of topics and leaving you with investment ideas to help boost any portfolio.

Participants

Conversation Lead: Tom Lydon - Co-CEO, ETFTrends.com & ETFdb.com

Panelist: Eric Balchunas - Senior ETF Analyst, Bloomberg Intelligence

Panelist: Matt Hougan - Chairman, Inside ETFs & Global Head of Research, Bitwise Asset Management

Panelist: Ben Johnson - Director of Global ETF Research, Morningstar

Panelist: Elisabeth Kashner - Director of ETF Research, FactSet

Panelist: Dave Nadig - Managing Director, ETF.com

Panelist: Todd Rosenbluth - Sr. Director, ETF & Mutual Fund Research, CFRA

Breakfast Workshop: Getting to Know Women in ETFs & Female Advisor Network

8:00am - 8:50am
Breakfast Workshop 2 – Location: La Valencia A

Don't miss your opportunity to meet, mingle with and learn about the two leading industry women's organizations. Choosing equality and diversity has never been more important, and these two organizations are bold and fearless—change makers helping to pave a better path for women in the industry.

Participants

Presenter: Jillian DelSignore - Head of US ETF Distribution, J.P. Morgan Asset Management

Presenter: Nina O'Neal - Partner & Investment Advisor, Archer Investment Management

Welcome Remarks - What is Wealth/Stack

9:00am - 9:20am

Participants

Presenter: Joshua Brown - CEO, Ritholtz Wealth Management

Addressing the 800 Pound Gorilla: Solving Your Tech Puzzle

9:20am - 10:10am

We all know technology makes our jobs easier, but getting started is more difficult than one might believe. Join our panel of CTOs from the largest RIAs as they teach you how to build your tech stack.

Participants

Moderator: Ryan W. Neal - Technology Reporter & Columnist, InvestmentNews

Panelist: Hamesh Chawla - EVP & Chief Technology Officer, Edelman Financial Services

Panelist: Hiral Desai - VP, Strategic Partnerships, Apex Clearing Corporation

Panelist: Teri Shepherd - President, Carson Group

Panelist: Edward Swenson - Chief Operating Officer, Dynasty Financial Partners

Customization & Direct Indexing: New Fad, or Way Forward?

10:10am - 10:40am

It's been decades since we've seen any real changes regarding how advisors construct portfolios. That's all about to change. Patrick O'Shaughnessy takes the Wealth/Stack stage to discuss the future of portfolio construction, building customized personal portfolios at the push of a button. This is a can't-miss talk for anyone who manages client assets.

Participants

Presenter: Patrick O'Shaughnessy - CEO, O'Shaughnessy Asset Management

Networking Break – Location: Exhibit Hall

10:40am - 11:10am

Wealth/Stack Presents: Technology & Its Influence on RIAs

11:10am - 11:40am

Technology is imperative in the modern financial advisory community, and change is accelerating. Not staying ahead of these changes is the same as ignoring it. We've invited the top-ranked advisor, fintech investor and entrepreneur in the wealth advisory industry, Steve Lockshin, to unveil his thoughts on the influence of fintech on the advisory community, and how incorporating a digital experience is a must to accelerate your business.

Participants

Presenter: Steve Lockshin - Principal, AdvicePeriod

Radical Future: What the Smart Money is Betting On

11:40am - 12:10pm

Technology has transformed every facet of the financial advice space. What was once perceived to be impossible is quickly becoming reality. For this session, we sourced the leading investors at the intersection of wealth management and technology to talk about what parts of the industry are ripest for disruption. Place your bets!

Participants

Moderator: Dave Nadig - Managing Director, ETF.com

Panelist: Morgan Housel - Partner, Collaborative Fund

Panelist: Howard Lindzon - Managing Director, Social Leverage

Panelist: Tripp Shriner - Partner, Point72 Ventures

Liquid Alts & Your Portfolio: What You Need to Know

12:10pm - 12:50pm

The return of volatility in late 2018 had many questioning if their portfolio was built to weather the storm. In an age where access and price are no longer concerns, investors are turning to more liquid alts and other hedging vehicles. Should you be using them?

Participants

Moderator: Ben Carlson - Director of Institutional Asset Management, Ritholtz Wealth Management

Panelist: Yasmin Dahya - Executive Director, Head of Americas Investment Specialist Team, Beta Strategies Group, J.P. Morgan Asset Management

Panelist: William Rhind - Founder & CEO, GraniteShares

Panelist: Shana Sissel - Sr. Portfolio Manager, CLS Investments

Panelist: Dan Villalon - Managing Director & Co-Head, Portfolio Solutions Group; Co-Host, The Curious Investor, AQR Capital Management

Networking Lunch – Location: Exhibit Hall

12:50pm - 1:55pm

Wealth/Stack is all about the best conference experience for our guests. With that in mind, we've structured our lunches to better suit your needs. Whether you enjoy this time to network with your peers, catch up on emails or visit our partners in the exhibit hall, Wealth/Stack has you covered.

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The Future of Fixed Income: Resetting the Benchmark

2:00pm - 2:40pm
WEALTH TRACK – Location: La Valencia A

The Agg was never intended to be an investment approach, yet billions of dollars are invested in it. With new technologies and new ideas on index construction, could the Agg become obsolete? Is active your best approach, or do we need to look beyond the current solutions?

Participants

Moderator: Caleb Silver - Editor-in-Chief, Investopedia

Panelist: Timothy Calkins - Director of Fixed Income, Nottingham Advisors Asset Management

Panelist: Kim Escue - Senior Portfolio Manager, Stringer Asset Management

Panelist: Elizabeth Marchetti - Investment Director, WST Capital Management

Streamlining Your Back Office: How to Win the Efficiency War

2:00pm - 2:40pm
TECH TRACK – Location: La Valencia B

Managing the back office is not the reason anyone decides to become a financial advisor. Unfortunately, it's part of the game and a necessary evil. In this breakout session, we explore how to improve your back-office operations, with a focus on your CRM and client reporting, and will leave you with ideas to save you both time and money.

Participants

Moderator: Janet Levaux - Editor in Chief, Investment Advisor magazine, and Senior Editor, ThinkAdvisor.com

Panelist: Sean Lawlor - Head of Enterprise Data Solutions, Envestnet

Panelist: Kyle Van Pelt - Strategy & Innovation, SS&C Black Diamond

Wealth/Stack Showcase 1

2:00pm - 2:30pm
Wealth/Stack Showcase - Location: Stack Stadium (El Teatro)

The Wealth/Stack Showcase will feature 5 cutting-edge fintech firms with promising technology we think our advisor community will love!

Presenters:

1. YCharts - Caleb Eplett, VP of Product Management
2. NaviPlan by Advicent - Tom Burmeister, VP - Financial Planning
3. Tulip - Dr. Daniel Crosby, Chief Behavioral Officer
4. Function4 - Jason Leffakis, Founder
5. Portformer by Astrocyte Research - Sean Kruzel, Founder of Portformer

Participants

Presenter: Caleb Eplett - VP of Product Management, YCharts

Presenter: Tom Burmeister - VP - Financial Planning, NaviPlan by Advicent

Presenter: Dr. Daniel Crosby - Chief Behavioral Officer, Brinker Capital

Presenter: Jason Leffakis - Founder, Function4

Presenter: Sean Kruzel - Founder of Portformer, Astrocyte Research

Using ETFs to Solve Client Problems

2:40pm - 3:20pm
WEALTH TRACK – Location: La Valencia A

This session will focus on the implementation of ETFs to solve everyday problems in your clients' portfolios and your asset allocation. Topics to be covered include factors at your core, sourcing income and creating a fixed income liquidity sleeve.

Participants

Moderator: Elisabeth Kashner - Director of ETF Research, FactSet

Panelist: Alex Piré - Head of Client Portfolio Management - Seeyond, Natixis Investment Managers

Panelist: Richard Powers - Head of ETF Product Management, Vanguard

Panelist: Ed Rosenberg - SVP, Head of ETFs, American Century Investments

Creating The Ultimate User Experience

2:40pm - 3:20pm
TECH TRACK – Location: La Valencia B

If you build it, they will come. That might be true in Iowa, but the same can't be said for advisor technology. Your product has to be user friendly, help advisors save time and money, and above all else, it has to add value to their practice. In this session, we explore the user interface and what it takes to build a truly revolutionary product.

Participants

Moderator: Jim Pavia - Money Editor, CNBC

Panelist: Andres Garcia-Amaya - CEO & Founder, Zoe Financial

Panelist: Anthony Stich - COO, Advicent

Panelist: Jason Wenk - CEO, Altruist

How to Scale Your Investment Strategy

3:20pm - 3:50pm
WEALTH TRACK – Location: La Valencia A

So you've designed a proprietary investment strategy. Now what? Effectively scaling your investment strategy requires more than passion, time and money. Let our experts walk you through the nitty-gritty of how to scale and make your strategy profitable.

Participants

Moderator: John Swolfs - CEO, Inside ETFs

Panelist: Phil Bak - Founder & CEO, Exponential ETFs

Panelist: Dan Cupkovic - Director of Investments, ARGI

The Dawn of Non-traditional Investing: Beyond Stocks, Bonds, and Commodities

3:20pm - 3:50pm
TECH TRACK – Location: La Valencia B

This in-depth session will take a hard look at nontraditional assets and how they can be used to help clients achieve their investment goals.

Participants

Moderator: Howard Lindzon - Managing Director, Social Leverage

Panelist: Christopher Bruno - Co-Founder & CEO, Rally Rd.

Panelist: Michael Sonnenshein - Managing Director, Grayscale Investments

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Wealth/Stack Showcase 2

3:20pm - 3:50pm
Wealth/Stack Showcase - Location: Stack Stadium (El Teatro)

The Wealth/Stack Showcase will feature 5 cutting-edge fintech firms with promising technology we think our advisor community will love!

Presenters:

1. Altruist - Harpreet Ahluwalia, VP Product
2. Halo Investing - Jason Barsema, Co-Founder & President
3. Helios Integrated Planning - Chris Shuba, Founder & CEO
4. Koyfin - Rob Koyfman, CEO
5. Harness Wealth - David Snider, Founder & CEO

Participants

Presenter: Harpreet Ahluwalia - VP Product, Altruist

Presenter: Jason Barsema - Co-Founder & President, Halo Investing

Presenter: Chris Shuba - Founder & CEO, Helios Integrated Planning & Helios Quantitative Research

Presenter: Rob Koyfman - CEO, Koyfin

Presenter: David Snider - Founder & CEO, Harness Wealth

Networking Break – Location: Exhibit Hall

3:50pm - 4:20pm

Talking to Clients About Performance: What You Say & What They Hear

4:20pm - 4:50pm

No one likes to see red on the monthly statements. More often than not, this will derail any real conversation. Is there a better way to report performance that allows clients to see the current status of their account while keeping an eye to the future?

Participants

Presenter: Daniel Egan - Director of Behavioral Finance & Investing, Betterment

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The 2020 Macro Panel: How to Read the Tea Leaves

4:50pm - 5:30pm

The 2020 election is already heating up! Larry Kudlow is taking to Twitter to celebrate low unemployment and a rising market, but how long can this bull market really run? What signals should you be keying in on to better understand if the upward climb will continue or come to a crashing halt? Wealth/Stack invites some of the brightest minds we know to talk through the potential hurdles to growth and how they're positioning assets.

Participants

Moderator: Annie Massa - Reporter, Bloomberg News

Panelist: Michael Arone - Chief Investment Strategist, US SPDR® Business, State Street Global Advisors

Panelist: Peter Boockvar - CIO, Bleakley Advisory Group

Panelist: Shannon Saccocia - Chief Investment Officer, Managing Director, Boston Private Wealth

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What it Takes to Become a RIA Giant

5:30pm - 6:00pm

Creative Planning has a permanent home on any list of top advisors in the U.S., and Peter is the only advisor to ever be listed No. 1 on the Barron's Top 100 Independent Financial Advisors three consecutive years, and was featured in Forbes as the No. 1 advisory firm for growth over the last 10 years. How did they build a $37 billion empire? Peter Mallouk, president of Creative Planning, opens up about how they grow, how they manage their business and what you need to know to super-charge your growth strategy.

Participants

Moderator: Barry Ritholtz - Chairman & CIO, Ritholtz Wealth Management

Interviewee: Peter Mallouk - President, Creative Planning

Networking in Exhibit Hall & Client Dinners

6:00pm - 7:00pm

Use your time wisely! If you are planning client dinners, we suggest hosting dinners during this time to avoid missing Wealth/Stack's Official Party (starting at 8:30pm). For anyone without dinner plans, please join us for networking in the exhibit hall.

Light Up the Vault with Naviplan – Location: The Mint Ultra Lounge

8:30pm - 11:30pm

Join us for Wealth/Stack's official evening party hosted with Naviplan by Advicent. The Mint Ultra Lounge, a former bank now turned nightclub, provides the perfect setting for Wealth/Stack attendees. Join your fellow attendees for an evening of great cocktails, activities and networking opportunities that can't be beat.

Music provided by the legendary DJ Skribble.

SCHEDULE

MONDAY SEPT 9TH - 09/09/2019

Wealth/Stack

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TIME	BREAKFAST WORKSHOP 1 – LOCATION: GRAND BALLROOM	BREAKFAST WORKSHOP 2 – LOCATION: LA VALENCIA A	TECH TRACK – LOCATION: LA VALENCIA B	WEALTH TRACK – LOCATION: LA VALENCIA A	WEALTH/STACK SHOWCASE - LOCATION: STACK STADIUM (EL TEATRO)
7:00AM	**7:30am** - Registration Opens	**7:30am** - Registration Opens	**7:30am** - Registration Opens	**7:30am** - Registration Opens	**7:30am** - Registration Opens
8:00AM	**8:00am** - Breakfast Workshop: The Battle of the ETF Pundits	**8:00am** - Breakfast Workshop: Getting to Know Women in ETFs & Female Advisor Network			
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2:00PM			**2:00pm** - Streamlining Your Back Office: How to Win the Efficiency War **2:40pm** - Creating The Ultimate User Experience	**2:00pm** - The Future of Fixed Income: Resetting the Benchmark **2:40pm** - Using ETFs to Solve Client Problems	**2:00pm** - Wealth/Stack Showcase 1
3:00PM	**3:50pm** - Networking Break – Location: Exhibit Hall	**3:50pm** - Networking Break – Location: Exhibit Hall	**3:20pm** - The Dawn of Non-traditional Investing: Beyond Stocks, Bonds, and Commodities **3:50pm** - Networking Break – Location: Exhibit Hall	**3:20pm** - How to Scale Your Investment Strategy **3:50pm** - Networking Break – Location: Exhibit Hall	**3:20pm** - Wealth/Stack Showcase 2 **3:50pm** - Networking Break – Location: Exhibit Hall
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TUESDAY SEPT 10 - 10/09/2019

Wealth/Stack

September 8 - 10, 2019
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Breakfast Workshop: Why Crypto? And Why Now? – Location: Grand Ballroom

8:00am - 8:50am
Breakfast Workshop 1 – Location: Grand Ballroom

Bitcoin is up 150%+ YTD. The Fed is slashing rates. Ray Dalio is worried about the dollar and debt monetization. Against this backdrop, many are turning to crypto as the new "safe haven" asset. But with prices so volatile, others are laughing it out of the room. Inside ETFs Chairman and noted crypto expert Matt Hougan dives into the latest on crypto: what it is, why it's important and why this is an especially important moment in its history. With the SEC scheduled to rule on bitcoin ETFs in October, this is not a session to miss.

Participants

Presenter: Matt Hougan - Chairman, Inside ETFs & Global Head of Research, Bitwise Asset Management

Opening Remarks

9:00am - 9:05am

Participants

Presenter: John Swolfs - CEO, Inside ETFs

Forget the Back Office: The Future of Fintech Isn't What You Think

9:05am - 9:35am

Let's face it: Robots are about to take over your back office, but can they do the same for your client relationships? Do clients even want that? In this provocative opening talk, leading tech futurist and advisor best friend Danielle Fava shares what she thinks is the next wave of fintech and why it only strengthens your client relationships.

Participants

Presenter: Danielle 'Dani' Fava - Director of Innovation, TD Ameritrade Institutional

Death of the Fiduciary Rule

9:35am - 10:05am

Has the rule been effectively killed, or will it be resurrected? And what will its fate mean to you and your clients? Join our leading experts as they direct you on how to shift gears and make the new rules protect you, your clients and your business.

Participants

Moderator: Dina Isola - Investment Advisor Representative, Ritholtz Wealth Management

Panelist: Nicole Boyson, Ph.D. - The Patrick F. and Helen C. Walsh Research Professor of Finance D'Amore-McKim School of Business, Northeastern University

Panelist: Barbara Roper - Director of Investor Protection, Consumer Federation of America

The Next-Gen Advisor: Why Investing is Boring & Advice is Sexy

10:05am - 10:30am

Almost 99% of financial media is focused on the performance of investments, yet investing is largely a "solved problem." The great challenge of the next 50 years isn't about asset allocation or stock selection, it's about changing the nature of your relationship with your clients. In this provocative 20-minute session, ETF.com's Dave Nadig breaks down why the best advisors spend the least amount of time worried about their clients' portfolios.

Participants

Presenter: Dave Nadig - Managing Director, ETF.com

Networking Break – Exhibit Hall

10:30am - 11:00am

What It Takes to Be a Great CEO

11:00am - 11:30am

It takes more than strong returns to be a great advisory firm. How you navigate the hurdles and bumps in the road will mean more to the success of your firm than your returns. Hear from industry expert Shirl Penney as he breaks down what it takes to lead your business, employees and clients to the next level.

Participants

Presenter: Shirl Penney - President & CEO, Dynasty Financial Partners

Lessons from the Future: Building an Advisory Practice in 2020 and Beyond

11:30am - 12:00pm

Pricing, integration, and simplification are the keys to the future. Hear from industry legend and entrepreneur Joe Duran as he opens up about what it will take to build an advisory practice that adds real value in 2020 and beyond.

Participants

Interviewer: Joshua Brown - CEO, Ritholtz Wealth Management

Interviewee: Joe Duran - CEO & Founding Partner, United Capital

Wealth/Stack Presents: Animal Spirits Live

12:00pm - 12:30pm

Two of your favorite podcasters—Michael Batnick and Ben Carlson of Animal Spirits, a show about the markets, life and investing—close the 1st annual Wealth/Stack conference with a live show in which they'll talk about what they're reading, writing, watching and listening to.

Participants

Host: Michael Batnick - Director of Research, Ritholtz Wealth Management

Host: Ben Carlson - Director of Institutional Asset Management, Ritholtz Wealth Management

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8:00AM	**8:00am** - Breakfast Workshop: Why Crypto? And Why Now? – Location: Grand Ballroom
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12:00PM	**12:00pm** - Wealth/Stack Presents: Animal Spirits Live