



Agenda At-a-Glance (as of 9/6/2022)

Monday, October 10

12:00-1:30 pm	Women's Initiative Reception & Luncheon		
1:45-2:50 pm	(1) Fundamentals of Alts	(2) DSTs, 1031s and 721s: What Advisors Need to Know	(3) Role of Liquidity in Product Creation
3:00-4:00 pm	(4) Impact Investing: A Case Study	(5) Portfolio Allocation Models: Advanced Topics	(6) Practice Management: Arbitrating Alts Product Claims
4:30-5:00 pm	Conference Kick-Off		
5:00-6:00 pm	General Session I: Industry Sector Reports		
6:00-7:00 pm	Opening Cocktail Reception		

Tuesday, October 11

8:00-9:00 am	Breakfast & Exhibition		
9:00-9:50 am	General Session II: Legislative & Regulatory Updates		
9:50-10:15 am	General Session III: CEO Panel -- Current Environment of Product Creation		
10:15-10:45 am	Break & Exhibition		
10:45-11:35 am	(7) New Products/Strategies Session	(8) Is Real Estate the Best Way to Offset Liquidity? Do REITs Still Make Sense?	(9) Portfolio Management: Maintaining the Spending Power Through Portfolio Construction
11:45 am-12:35 pm	(10) Adding New Products to Portfolios: Stay Up to Date!	(11) Offering Approaches: 506b vs. 506c	(12) Trends and Predictions on Impact/ESG
12:35-1:45 pm	Lunch & Exhibition		
1:45-2:35 pm	(13) Speaking with Clients about Impact/ESG	(14) DST Underwriting Analysis: When is 3.5% Better than 6%?	(15) Product Structure: How to Spot a Good Deal
2:45-3:35 pm	(16) New DST Best Practices	(17) Investing in Crypto in Current Regulatory Environment	(18) Proceed with Caution: Bad Actors and Their Impact
3:35-4:00 pm	Break & Exhibition		
4:00-4:50 pm	(19) Opportunity Zones: Maximizing the Opportunity (Plus Legislative Updates)	(20) Current Issues in Energy Investing	(21) Marketing Rules & Regs: What Does Rule 2210 Mean?
5:00-6:00 pm	Keynote Speaker Cal Ripken, Jr.		

6:15-7:15 pm	Cocktail Reception
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Wednesday, October 12

7:30-9:00 am	Breakfast & Exhibition
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9:00-10:00 am	General Session V: Personal Technology: How to Keep Up Without Being Swept Up
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10:10-11:00 am	(22) Broker-Dealer Advisory Council	(23) RIA Advisory Council	(24) Sponsor Roundtable
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11:10 am-12:00 pm	(25) Private Equity Basics	(26) Practice Management: Is Your KYC Compliant?	(27) Personal Technology Workshop
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