WELCOME AGENDA SPEAKERS SESSIONS TRAVEL SPONSORS REGISTRATION

INSIDE TRACK

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Agenda

Wednesday, October 28, 2015

Alternative Investments Forum+*

11:30 a.m. - 12:30 p.m.	**Lunch and Registration**
12:00 p.m. – 5:00 p.m.	**Alternative Investments Forum+* (detailed agenda)** Representatives from **AlphaCore, American Beacon, American Realty Capital, BlackRock, CAIS, Fidelity Investments, Franklin Square, Griffin Capital, Goldman Sachs, John Hancock, Maverick Capital**, **Morningstar, Inc., Neuberger Berman, NFP, Tangent Capital,** and **The Wharton School**
5:30 p.m. - 7:30 p.m.	**Dinner and Keynote Speaker**

Thursday, October 29, 2015

Inside Track Pre-Conference Workshops

8:00 – 8:30 a.m.	**Breakfast and Workshop Registration**
8:30 – 11:30 a.m.	**Elevate Your Growth: Generating Referrals from Your Best Clients *** **Anand Sekhar**, Vice President, Practice Management and Consulting, Fidelity Investments **Ross Ozer**, Senior Vice President, Practice Management and Consulting, Fidelity Investments OR **Alternative Investments Forum+* (detailed agenda)** Representatives from **AlphaCore, American Beacon, American Realty Capital, BlackRock, CAIS, Fidelity Investments, Franklin Square, Griffin Capital, Goldman Sachs, John Hancock, Maverick Capital**, **Morningstar, Inc., Neuberger Berman, NFP, Tangent Capital,** and **The Wharton School**

Inside Track Conference

11:30 a.m.	**Registration**
11:30 a.m. – 12:30 p.m.	**Lunch** **Business Building Exposition**
12:30 – 12:45 p.m.	**Kickoff and Welcome** **Rich Policastro**, Senior Vice President, Sales and Relationship Management, Fidelity Investments
12:45 – 1:45 p.m.	**Essentialism: The Disciplined Pursuit of Less** **Greg McKeown**, CEO, This Inc.; Author, *Essentialism: The Disciplined Pursuit of Less*
1:45 – 2:00 p.m.	**Break**
2:00 – 3:00 p.m.	**Breakout Sessions**

	Pursuing Growth through 401(k) Plan Advice * **Meg Kelleher**, Executive Vice President, Retirement Advisor and Recordkeepers, Fidelity Investments; and **Anand Sekhar**, Vice President, Practice Management and Consulting, Fidelity Investments **Fueling Growth with Benchmarking Insights on Marketing and Business Development** **Mathias Hitchcock**, Vice President, Practice Management and Consulting, Fidelity Investments **Opportunities and Challenges with U.S. Equities** +* **Moderator:** **Chris Alpaugh**, National Sales Manager, Wealth Advisor Services, Fidelity Financial Advisor Solutions **Panelists:** Representatives from Manning & Napier, Northern Trust and Gabelli
3:00 – 3:15 p.m.	**Break**
3:15 – 4:15 p.m.	**Breakout Sessions** **Aligning M&A with Your Firm's Business Strategy** **Moderator:** **Jylanne Dunne**, Senior Vice President, Practice Management and Consulting, Fidelity Investments **Catherine Williams**, Vice President, Practice Management and Consulting, Fidelity Investments **Panelist:** **Steve Levitt**, Managing Director and Co-Founder, Park Sutton Advisors **The Importance of Managing Currency Exposure** +* **Dodd Kittsley**, Director, Deutsche Asset & Wealth Management
4:15 – 4:30 p.m.	**Break**
4:30 – 5:15 p.m.	**State of the Market** +* **Jurrien Timmer**, Director of Global Macro, Fidelity Investments
5:15 – 5:45 p.m.	**Be Greater® Awards Ceremony** **Hosted by:** **Bob Oros**, Senior Vice President, Fidelity Investments
5:45 – 5:50 p.m.	**Wrap-Up and Close**
5:50 – 6:30 p.m.	**Reception in Business Building Exposition**
6:30 – 8:30 p.m.	**Dinner**

Friday, October 30, 2015

7:30 – 8:30 a.m.	**Breakfast** **Business Building Exposition**
8:30 – 8:40 a.m.	**Welcome - Day Two** **Hazel Durand**, Senior Vice President, Sales and Relationship Management, Fidelity Investments
8:40 – 9:30 a.m.	**YES!: Small Changes that Spark Big Influence** **Noah Goldstein**, Professor, Anderson School of Management, UCLA
9:30 – 9:45 a.m.	**Break**
9:45 – 10:45 a.m.	**Breakout Sessions** **Protecting Your Firm and Clients from Fraud** * **Bill French**, Vice President, Customer Protection and Financial Intelligence Group, Fidelity Investments

	Prospects for Fixed Income Investing +* **Moderator:** **Bill Sheehan**, Vice President, Wealth Advisor Services, Fidelity Financial Advisor Solutions **Panelists:** Representatives from Pioneer, Franklin Templeton and Guggenheim
10:45 – 11:00 a.m.	**Break**
11:00 a.m. – 12:00 p.m.	**Evolving Your Firm for the Future: Finding the Right Mix of Service and Technology for Tomorrow's Client** **Moderator:** **Jylanne Dunne**, Senior Vice President, Practice Management and Consulting, Fidelity Investments **Panelist:** **Joe Duran**, Chief Executive Officer and Founding Partner, United Capital
12:00 – 1:00 p.m.	**Lunch** **Optional Lunch Roundtables** **Collaborating with Recordkeepers to Serve 401(k) Plans: An Optional Lunch Roundtable** **Meg Kelleher**, Executive Vice President, Retirement Advisor and Recordkeepers, Fidelity Investments **Evolving Your Firm for the Future: An Optional Lunch Roundtable** **Moderator:** **Jylanne Dunne**, Senior Vice President, Practice Management and Consulting, Fidelity Investments
1:00 – 2:30 p.m.	**Fast Ways to Fill Your Pipeline: Strategies for Harnessing Social Media and the Web to Help Grow Your Practice** **Kip Gregory**, Principal, The Gregory Group
2:30 – 2:40 p.m.	**Closing Remarks**

[1]*Agenda and speakers are subject to change*

+Qualifies for credit towards the CFP® certification.

**Qualifies for CE credit towards the CIMA®, CIMC® and CPWA® certifications*