

BSMARTer Graduate Program AGENDA

Wednesday, November 11th

Location

All Day	Arrivals	Worthington Renaissance Fort Worth Hotel 200 Main Street Fort Worth, TX
6:00 – 8:30 p.m. Street	Welcome Reception: Graduate Program Launch Bob Oros, EVP, IWS RIA Sales & Relationship Management Philip Palaveev, CEO, Ensemble Practice	Reata Restaurant 310 Houston Fort Worth, TX

Thursday, November 12th

Location

7:15 a.m.	Ground Transportation Departs	Worthington Renaissance Fort Worth Hotel Main Lobby
8:00 – 8:30 a.m.	Breakfast	Westlake Campus - 1 Destiny Way Auditorium
8:30 – 10:00 a.m.	Presentation 1: Succession <i>Philip Palaveev, CEO, The Ensemble Practice</i>	Auditorium
10:00 – 10:15 a.m.	Break	
10:15 – 11:30 a.m.	Guest Speakers: Succession Expert Panel <i>Kaycee Kristy, former CEO of Laird Norton Tyee</i> <i>Eric Hehman, CEO Austin Asset</i> <i>Steve M. Levitt, Managing Director/Co-Founder of Park Sutton Advisors</i>	Auditorium
11:30 – 12:15 p.m.	Case Study Review	Auditorium
12:15 – 2:00 p.m.	Working Lunch: Team Case Study & Planning Recommendations <i>Planning/ Case Solution</i>	Auditorium
2:00 – 3:45 p.m.	Presentations (separate room) RMs 3 teams in each room – Internal Solution Sales 2 teams in each room – External Solution <i>Judges Panel: Ensemble, Practice Management, Guest Speaker, 3 Cook members</i>	

3:45 – 4:30 p.m.

Debrief (join room)

Auditorium

4:30 p.m.
Way

Departures

Westlake Campus - 1 Destiny