INSIDE TRACK

Register Now

Agenda

Tuesday, September 29, 2015

Pre-Conference Workshop

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 Pre-Conference Forum**+* **(detailed agenda)** Representatives from **BlackRock, CAIS, Fidelity Investments, Goldentree Asset Management, Goldman Sachs, Ironwood Asset Management, Corsair Strategic Advisors**, and **Morningstar Investment Management Inc.**

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** **Mike Romano**, 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: Douglas Burtnick, CFA®**, Deputy Head of North American Equities, Aberdeen Asset Management PLC; **Paul Ebner, CFA®**, Director and Senior Portfolio Manager, BlackRock; **Michael Arone, CFA®**, Chief Investment Strategist, Intermediary Business Group, State Street Global Advisors

3:00 – 3:15 p.m.	**Break**
3:15 – 4:15 p.m.	**Breakout Sessions** **Aligning M&A with Your Firm's Business Strategy** **Moderators:** **Catherine Williams**, Vice President, Practice Management and Consulting, Fidelity Investments; **Jylanne Dunne**, Senior Vice President, Practice Management and Consulting, Fidelity Investments **Panelist:** **Steve Levitt**, Managing Director and Co-Founder, Park Sutton Advisors **Three Methods to Pursue Better Portfolio Outcomes** **David Morrison**, Senior Vice President and Intermediary Relationship Manager, American Funds
4:15 – 4:30 p.m.	**Break**
4:30 – 5:30 p.m.	**State of the Market** **+*** **Jurrien Timmer**, Director of Global Macro, Fidelity Investments
5:30 – 5:40 p.m.	**Closing**
5:40 – 6:30 p.m.	**Reception in Business Building Exposition**
6:30 – 8:30 p.m.	**Dinner**

Wednesday, September 30, 2015

7:30 – 8:30 a.m.	**Breakfast** **Business Building Exposition**
8:30 – 8:40 a.m.	**Welcome - Day Two** **Bob Evans**, Senior Vice President, National Accounts, 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:** **Germaine Harris**, Vice President, Wealth Advisor Services, Fidelity Financial Advisor Solutions **Panelists:** **Brian Cordes**, Vice President and Portfolio Specialist, Cohen & Steers; **Mark Cernicky, CFA®**, Managing Director - Global Fixed Income, Principal Global Investors; A representatives from Legg Mason
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:** **David Canter**, Executive Vice President, Practice Management and Consulting, Fidelity Investments **Panelists:** **Brian Leitner**, Senior Vice President, Practice Management, Mariner Wealth Advisors; **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*