

## Agenda

Wednesday, May 8

*Women in Wealth Brunch 10:30 am - 12:00 pm (RSVP required)*

**Opening Address: Harnessing Your Firm's Next-Level Talent and Growth for Success**  
David DeVoe, Founder and CEO, DeVoe & Company

### Keynote Address

**Building an All-Star Team that Fuels Growth**

Jennifer Koch, Senior Vice President, Head Of Organizational Development, Sequoia Financial Group

**Creating a Culture to Attract and Retain Top Talent**

Debi Murphy, Managing Director, Partnership Integration, EP Wealth Advisors

Kelly Carolan, Senior Director, People Business Partner, BNY Mellon | Pershing

Matthew Adams, Chief Executive Officer and Managing Partner, Mission Wealth

Moderator: Jane Williams, Special Advisor, DeVoe & Company

*Main Evening Event at El Chorro Restaurant*

Thursday, May 9

**Best Practices for Succession Planning**

Tim Kochis, Special Advisor, DeVoe & Company

**Tales from the Field: Planning for Succession**

Dr. Peter Fisher, Founding Partner, CEO, Human Investing

Robert Steinberg, Founder and CEO, Blue Chip Partners

Thomas Carroll, Principal, President & CEO, Homrich Berg Wealth Management

Moderator: Peggy Ruhlin, Special Advisor, DeVoe & Company

**Spotlight: Insights from the Foundation for Financial Planning**

Jon Dauphiné, Esq., CEO, Foundation for Financial Planning

**The Referral Code: Creating a Pipeline of High Net Worth Referrals**

Brett Van Bortel, Director of Development & Delivery, Invesco Global Consulting

**Key Drivers for Organic Growth**

Stacia Hatfield, Managing Director, DeVoe & Company

**Ideas to Build a High-Growth Organization**

Bryan Powers, Executive Vice President, Sales, Mercer Advisors

Gary Foodim, Chief Marketing Officer, Mercer Advisors

**The First 90 Days: A Comprehensive Action Plan for New Clients to Fuel Growth**

**Featured Speaker**

Dennis Moseley-Williams, Founder & CEO, Dennis Moseley-Williams Strategic Consulting

*Rockin' Rodeo Reception in the Exhibit Lounge (Concurrent with One-on-One Expert Meetings)*

Friday, May 10

### Keynote Address

**The Fearless Growth Journey**

Aaron Klein, Co-Founder and Former CEO, Nitrogen (formerly Riskalyze)

Ben Harrison, Managing Director, Head of Wealth Solutions, BNY Mellon | Pershing

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### **Secrets of Top-Growing Firms**

**Indya M. Yuill**, Partner, Managing Director, **Beacon Pointe Advisors**

**Jason Gordo**, President & Co – Founder, **Modern Wealth Management**

**Natalie Straub**, Chief Revenue Officer, **Coldstream Wealth Management**

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### **Strategies for Solving NextGen Financing**

**Dustin Mangone**, Managing Partner | Director of Investment Advisor Program, **PPC LOAN**

**Trey Schnippel**, Vice President – Investment Advisory Lending, **Live Oak Bank**

**Rick Dennen**, Founder and CEO, **Oak Street Funding**

*Moderator: Brad Grubb, Managing Director, DeVoe & Company*

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### **Driving Growth Through Referrals and Client Acquisition Strategies**

**Mike Van Wyk**, Director of Customer Research & Insights, **Capital Group**

**Antonio Bass**, Regional Vice President, RIA Relationship Manager, **Capital Group**

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### **Closing Comments**

**Program Ends at 12:00 pm**

*\*Schedule is subject to change. More sessions and speakers to be added\**