



## M&A+ Succession Summit Agenda The Ritz-Carlton Dallas

### Monday, September 18

5:30 pm – 7:00 pm	<b>Welcome Reception at Te Deseo</b> Join us as we kick off the 2023 M&A+ Summit with an energizing welcome reception, including appetizers, drinks and mingling. The evening is sponsored by Modern Wealth Management. Te Deseo is located within a short walking distance of the Ritz-Carlton at 2700 Olive Street, Dallas.
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### Tuesday, September 19

7:30 am – 8:30 am	<b>Networking Breakfast</b>
8:30 am – 9:20 am	<b>Opening Address: RIA Industry and M&amp;A Trends</b> David DeVoe, Founder and CEO, DeVoe & Company
9:20 am – 10:00 am	<b>Blueprint for Success: The Nuts and Bolts of a High-Performing Firm</b> Catherine Williams, Head of Practice Management, Dimensional Fund Advisors
10:00 am – 10:30 am	<b>Networking Break   Exhibits</b>
10:30 am – 11:20 am	<b>Lessons from Seasoned Acquirers I: Identifying the Optimal Partner</b> Dave Barton, Vice Chairman and M&A Leader, Mercer Advisors Mike LaMena, Chief Executive Officer, Wealthspire Advisors Scott Holsopple, Chief Growth Officer, Hightower <i>Moderator: Francine Miltenberger, Managing Director, DeVoe &amp; Company</i>
11:20 am – 12:00 pm	<b>Changing of the Guard: The Succession Conversation</b> Brett Van Bortel, Director of Consulting Services, Invesco Global Consulting
12:00 pm – 1:00 pm	<b>Networking Lunch</b>
1:00 pm – 1:45 pm	<b>Day One Keynote Address: Beacon Pointe Advisors</b> Fireside chat with Shannon Eusey, Chief Executive Officer, Beacon Pointe Advisors and Matt Cooper, Partner and President, Beacon Pointe Advisors <i>Moderator: Francine Miltenberger, Managing Director, DeVoe &amp; Company</i>
1:45 pm – 2:30 pm	<b>Tales from the Field: Stories of Successful Transitions</b> Ryan Caldwell, CEO and Wealth Advisor, Wacker Wealth Partners Thomas Carroll, Principal & President, Homrich Berg Wealth Management T.J. Troutner, Senior Vice President   Financial Advisor, Wealth Enhancement Group <i>Moderator: Peggy Ruhlin, Special Advisor, DeVoe &amp; Company</i>
2:30 pm – 3:00 pm	<b>Networking Break   Exhibits</b>
3:00 pm – 3:50 pm	<b>State of the Union: Wealth Management Industry Outlook</b> Jon Beatty, Chief Operating Officer, Advisor Services, Charles Schwab David Canter, President, Bluespring Wealth Partners Ben Harrison, Managing Director   Head of Wealth Solutions, BNY Mellon   Pershing <i>Moderator: Brian Hamburger, Founder   President   CEO, MarketCounsel   HamburgerLaw</i>
4:00 pm – 5:30 pm	<b>1:1 Meetings with Experts   Happy Hour in the Exhibit Lounge</b>
6:30 pm – 9:00 pm	<b>M&amp;A+ Summit Reception and Dinner at The Henry</b> Join us for food and libations with an indoor / outdoor experience including open air rooftop. Located within a short walking distance from the Ritz-Carlton at 2301 Akard Street, Dallas.



## M&A+ Succession Summit Agenda The Ritz-Carlton Dallas

Wednesday, September 20

7:30 am – 8:30 am **Networking Breakfast**

8:30 am – 9:15 am **Day Two Keynote Address: Choreo**  
Fireside Chat with Larry Miles, Chief Executive Officer, Choreo  
*Moderator: Lisa Salvi, Managing Director, Advisor Services, Charles Schwab*

9:15 am – 9:45 am **Valuations and Deal Structure in Today's Market**  
Adam Levy, Managing Director, DeVoe & Company

9:45 am – 10:35 am **Lessons from Seasoned Acquirers II: Differentiating Your Firm as a Seller or Buyer**  
Michael Belluomini, Vice President, Mergers and Acquisitions, Carson Group  
James Gold, Chief Executive Officer, Steward Partners  
Jeremy Holly, Executive Vice President, Strategic Business Development, LPL Financial  
*Moderator: Brad Grubb, Managing Director, DeVoe & Company*

10:35 am – 10:55 am **Networking Break | Exhibits**

10:55 am – 11:25 am **Four Funerals and a Wedding: Dos and Don'ts for M&A and Succession**  
David DeVoe, Founder and CEO, DeVoe & Company

11:25 am – 12:15 pm **Financing Your M&A and Succession Plans**  
Alicia Chandler, President, Oak Street Funding  
James Hughes, Head of Investment Advisory Lending, Live Oak Bank  
Mike King, Managing Director, Wintrust Financial  
Dustin Mangone, Managing Partner, PPCLOAN  
*Moderator: Brad Grubb, Managing Director, DeVoe & Company*

12:15 pm **Closing Comments**

*Times subject to change*