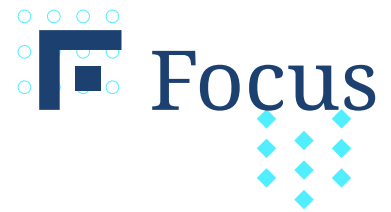


# Focus 2020 Agenda



Wednesday, August 19, 2020

8:00 - 9:00 a.m. PT **Expo**

9:00 - 11:00 a.m. PT **Focus Live!**

**Key topics include:**

- Kicking off Focus 2020 with LPL executives including Dan Arnold, Andy Kalbaugh, and Burt White
- Advisor stories about connecting with clients in new ways in today's environment
- Delivering a creative, engaging client experience
- Financial planning discussion
- Understanding the diverse perspectives of your clients
- Leveraging Marketing Solutions to reach more clients

11:15 - 11:45 a.m. PT **Sponsor Breakout Sessions**

**Choose one of eight concurrent breakout sessions from our PLUS and Elite Sponsors**

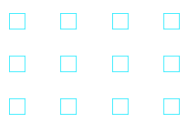
- The Financial Professional's Guide to Estate Planning, Hosted by Transamerica
- Survival of the Fittest: Using the Right Words to Win the Income Battle, Hosted by Global Atlantic Financial Group
- The Three Habits of Highly Successful Financial Professionals During COVID-19, Hosted by Lincoln Financial Distributors
- SECURE Act: Five Key Strategies Clients Need to Consider, Hosted by Putnam Investments
- Facts over Fear: Actionable Insights from J.P. Morgan to Guide Clients Through the Cycle, Hosted by J.P. Morgan Asset Management
- What Matters Most Right Now: Resilient Advisor — The Right Words at the Right Time, Hosted by Invesco
- Rules of Engagement: Becoming a Financial Professional of Choice, Hosted by Brighthouse Financial
- Challenging Market Checkup: Top Planning Considerations to Discuss with Your Clients Now, Hosted by Capital Group | American Funds

12:00 - 12:30 p.m. PT **Home Office Breakout Sessions**

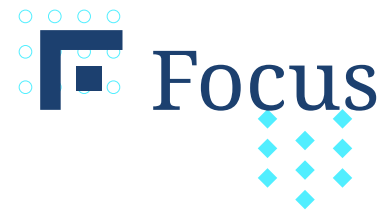
**Choose one of six concurrent breakout sessions from LPL Home Office**

- The Benefits of Wealth Management in a Reg BI World, Hosted by Advisory
- Maximize Your Value (and Revenue) Through Financial Planning, Hosted by Financial Planning Group
- Using Technology to Effectively Connect with Your Clients, Hosted by Product Marketing & Product Management
- The Care Transformation: Enhancing Your Service Experience, Hosted by Service, Trading & Operations
- Forming & Norming Digital Client Relationships, Hosted by Product Management
- Creating Engaging Social Media Content That Builds Relationships, Hosted by Marketing

12:30 - 1:30 p.m. PT **Expo**



# Focus 2020 Agenda



Thursday, August 20, 2020

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8:00 - 9:00 a.m. PT **Expo**

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9:00 - 11:00 a.m. PT **Focus Live!**

**Key topics include:**

- Dan Arnold, Andy Kalbaugh, and Burt White welcome you back for Day 2
  - The latest capabilities and technologies to improve the productivity your practice
  - A spotlight on our Care Transformation and improving your service experience, with Dayton Semerjian
  - Advisor insights on outsourcing expertise to grow your business
  - A breakdown with Matt Enyedi on making Business Solutions work for you
  - The value of legacy planning and the M&A support we can offer
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11:15 - 11:45 a.m. PT **Sponsor Breakout Sessions**

**Choose one of eight concurrent breakout sessions from our PLUS and Elite Sponsors**

- Rising Healthcare Costs: A Need for Increasing Income, Hosted by Allianz Life
  - Communicating Your Value: Discussing Fees with Your Clients, Hosted by John Hancock Investment Management
  - Endemic Growth: The Core Growth Strategy of Elite Advisors, Hosted by First Trust Portfolios
  - Best Practices for Retirement Income Planning, Hosted by AIG
  - Five Ways Technology Will Change How You Age, Hosted by Hartford Funds
  - Client Conversations: I've Inherited an IRA, Now What?, Hosted by Pacific Life
  - Prospecting Events in a Virtual World: What's Working!, Hosted by MFS Investment Management
  - Social Security: The Choice of a Lifetime, Hosted by Nationwide
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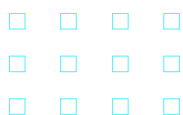
12:00 - 12:30 p.m. PT **Home Office Breakout Sessions**

**Choose one of six concurrent breakout sessions from LPL Home Office**

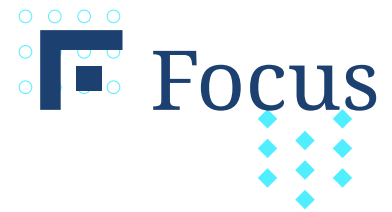
- Guidance for Working Remotely and Business Contingency Plans, Hosted by Compliance, Legal and Risk
  - Accelerate Your Growth: Advisor M&A Playbook, Hosted by Advisor Financial Solutions
  - Program Manager Town Hall, Hosted by Institution Services Business Consulting
  - New Opportunities to Grow Your Business, Hosted by Business Solutions
  - Building a Technology Stack for Success, Hosted by Product Strategy
  - Experience the Benefits and Flexibility of MWP and Advisor Sleeve, Hosted by Advisory
  - Billing at a Household Level for SAM/SWM, Hosted by Product Management
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12:30 - 1:30 p.m. PT **Expo**

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# Focus 2020 Agenda



Friday, August 21, 2020

8:00 - 9:00 a.m. PT **Expo**

9:00 - 11:30 a.m. PT **Focus Live!**

**Key topics include:**

- Special keynote address by former Secretaries of State General Colin L. Powell and Dr. Madeleine K. Albright
- Navigating regulations and industry changes, with LPL's Government Relations team
- A special Market Signals episode with Burt White and Ryan Detrick
- Insights from Rich Steinmeier on evolving your business and staying ahead of the competition
- Exploring the future of advice
- A special Town Hall with LPL executives Dan Arnold, Andy Kalbaugh, and Burt White

11:45 a.m. -  
12:15 p.m. PT

**Sponsor Breakout Sessions**

**Choose one of eight concurrent breakout sessions from our PLUS and Elite Sponsors**

- Policy and Politics: A Country in Crisis and the 2020 Election, Hosted by Natixis Investment Managers
- The Anatomy of a Recession Q3 2020 Update: What to Look for and Where We're Headed, Hosted by Legg Mason Global Asset Management
- Five Steps to Make the Impossible Possible, Hosted by Equitable
- Build Your Business for the Future, Hosted by BlackRock®
- Five Financial Planning Strategies to Help Navigate the Current Crisis, Hosted by Prudential Annuities
- Generating High Income, Limiting Downside Risk: Strategies for Today's Income Investor, Hosted by AllianceBernstein
- Play on Purpose, Hosted by Jackson
- Wealth at Work: Decision Points in Today's Employment Environment, Hosted by Columbia Threadneedle Investments

12:30 - 1:00 p.m. PT **Home Office Breakout Sessions**

**Choose one of six concurrent breakout sessions from LPL Home Office**

- Achieving Growth Through Acquisition, Hosted by Advisor Diversity and Inclusion
- LPL Research Midyear Outlook, Hosted by Research
- Become a Thrivalist by Leading Through Challenging Times, Hosted by Product Marketing
- Reimagining Your Practice of the Future, Hosted by Business Solutions
- Sustainable Investing: A Force For Positive Change, Hosted by Research
- Finding the Right Successor for Your Business, Hosted by IAS Business Consulting

1:00 - 2:00 p.m. PT **Expo**

