

Conference Agenda

(As of July 19, 2023, Subject to Change)

Thursday, August 3

Time	Item	Location
12:00 p.m. – 5:00 p.m.	Registration Desk Hours	Hall D Lobby, Ground Level
12:00 p.m. – 7:00 p.m.	Shuttle Service from San Diego International Airport to Focus Hotels	

Friday, August 4

Time	Item	Location
7:00 a.m. – 9:30 p.m.	Registration Desk Hours	Hall D Lobby, Ground Level
7:30 a.m. – 9:00 a.m.	Breakfast for registered Pre-Conference Workshop Attendees	Sails Pavilion, Upper Level
8:00 a.m. – 3:00 p.m.	Pre-Conference Workshops	Upper Level
9:00 a.m. – 7:00 p.m.	Shuttle Service from San Diego International Airport to Focus Hotels	
11:30 a.m. – 1:30 p.m.	Lunch for registered Pre-Conference Workshop Attendees	Sails Pavilion, Upper Level
4:00 p.m. – 5:00 p.m.	Firm Element Session: Security & Privacy <i>(Pre-Registration Required)</i>	Room 6A, Upper Level
6:00 p.m. – 7:30 p.m.	General Session ~Matt Enyedi, Managing Director, Client Success ~Keynote Speaker - Col. Nicole Malachowski, USAF (Ret.)	Halls GH, Ground Level
7:30 p.m. – 9:30 p.m.	Welcome Reception & Expo	Halls C-F, Ground Level

Saturday, August 5

Time	Item	Location
6:00 a.m. – 6:50 a.m.	Wellness Activity: Pilates Bootcamp	1B, Upper Level
6:30 a.m. – 5:00 p.m.	Registration Desk Hours	Hall D Lobby, Ground Level
7:00 a.m. – 8:00 a.m.	Breakfast	Halls C, Ground Level
7:00 a.m. – 5:00 p.m.	Expo Open	Halls C-F, Ground Level
8:00 a.m. – 10:00 a.m.	<p>General Session</p> <p>~Dan Arnold, President & Chief Executive Officer and Matt Enyedi, Managing Director, Client Success</p> <p>~Greg Gates, Managing Director, Chief Technology & Information Officer, Kabir Sethi, Managing Director, Chief Product Officer and Kristie Edling-Day, Executive Vice President, Chief Information Officer</p> <p>~Robert Pettman, Executive Vice President, Wealth Management Solutions and Doug Ostrover, Co-Founder and Chief Executive Officer, Blue Owl Capital, Inc.</p>	Halls GH, Ground Level
10:30 a.m. – 11:30 a.m.	Firm Element Session: Annual Compliance Meeting	Halls GH, Ground Level
11:30 a.m. – 1:00 p.m.	Lunch	Halls C, Ground Level
1:00 p.m. – 1:50 p.m.	Breakout Sessions	Upper Level
2:05 p.m. – 2:55 p.m.	Breakout Sessions	Upper Level
2:05 p.m. – 2:55 p.m.	Town Hall with Dan Arnold <i>(Pre-Registration Required)</i>	Room 20AB, Upper Level
2:05 p.m. – 2:55 p.m.	Firm Element Session: Security & Privacy <i>(Pre-Registration Required)</i>	Room 6A, Upper Level
3:10 p.m. – 4:00 p.m.	Breakout Sessions	Upper Level
4:15 p.m. – 5:05 p.m.	Breakout Sessions	Upper Level
	Free Night	

Sunday, August 6

Time	Item	Location
6:00 a.m. – 6:50 a.m.	Wellness Activity: Say No to Stress Meditation	1B, Upper Level
6:30 a.m. – 9:30 p.m.	Registration Desk Hours	Hall D Lobby, Ground Level
7:00 a.m. – 8:00 a.m.	Breakfast	Halls C, Ground Level
7:00 a.m. – 5:00 p.m.	Expo Open	Halls C-F, Ground Level
8:00 a.m. – 10:00 a.m.	General Session ~Leadership Presentations: - Aneri Jambusaria, Managing Director, LPL Services Group - Scott Belous, Executive Vice President, Investor Experience - Angela Xavier, Executive Vice President, Client Success, Innovation & Delivery and John O'Neill, Executive Vice President, Client Success, Service & Supervision ~Keynote Speaker - Erik Wahl, Internationally Recognized Artist, TED Speaker, and No. 1 Bestselling Author	Halls GH, Ground Level
10:30 a.m. – 11:30 a.m.	Firm Element Session: Anti-Money Laundering, Fraud, and Financial Crimes	Halls GH, Ground Level
11:30 a.m. – 1:00 p.m.	Lunch	Halls C, Ground Level
1:00 p.m. – 1:50 p.m.	Breakout Sessions	Upper Level
2:05 p.m. – 2:55 p.m.	Breakout Sessions	Upper Level
3:10 p.m. – 4:00 p.m.	Breakout Sessions	Upper Level
4:15 p.m. – 5:05 p.m.	Breakout Sessions	Upper Level
4:15 p.m. – 5:05 p.m.	Firm Element Session: Security & Privacy <i>(Pre-Registration Required)</i>	Room 6A, Upper Level
5:05 p.m. – 8:00 p.m.	Free Time	
8:00 p.m. – 9:30 p.m.	Final Night Concert with Bryan Adams <i>Doors open at 7:30 p.m.</i>	Halls GH, Ground Level

Monday, August 7

Time	Item	Location
5:00 a.m. – 12:00 p.m.	Shuttle Service from Focus Hotels to San Diego Int'l Airport	
8:00 a.m. – 12:00 p.m.	Registration Desk Hours	Hall D Lobby, Ground Level