

osaic CONNECTED

Agenda

Sunday, October 27th

8:00 a.m. – 4:00 p.m.	Pre-Conference Session: American Portfolios Transition Technology Training Workshop
11:30 a.m. – 2:00 p.m.	Osaic Council Summit & Individual Council Meetings
12:00 p.m. – 4:00 p.m.	Pre-Conference Sessions <i>(Times will vary – schedule travel to arrive by 12 noon. Registration coming early September.)</i> <ul style="list-style-type: none">• Ethics CE: CFP Board’s Revised Code and Standards• Accelerate with Advisory: Strategies for Optimizing Your Assets• Family Office 2.0: The Best in Class for Your Clients• From Top Producer to Great Leader: How to Nail a Tricky Transition• MoneyGuide Workshop• NextGen Practice Management Peer Sharing Group• SupportCentric Workshop for Support Staff
2:00 p.m. - 4:00 p.m.	OFA/OFS Town Hall and Networking Event
4:15 p.m. – 4:45 p.m.	First Time Attendee Experience
6:00 pm – 7:15 p.m.	Opening General Session with Keynote
7:15 p.m. – 9:00 p.m.	Welcome Reception in Marketplace

Monday, October 28th

7:00 a.m. – 8:00 a.m.	Breakfast
8:15 a.m. - 10:45 a.m.	General Session
11:00 a.m. – 12:30 p.m.	Lunch
11:30 a.m. – 4:20 p.m.	ConnectED Marketplace
12:30 p.m. – 4:35 p.m.	Breakout Sessions
4:50 p.m. – 6:15 p.m.	Annual Compliance Meeting
6:15 p.m. – 7:15 p.m.	Happy Hour with our Osaic Communities - <i>in the Marketplace</i>
Evening	Evening at Leisure

Tuesday, October 29th

7:00 a.m. – 8:00 a.m.	Breakfast
8:15 a.m. – 10:45 a.m.	Closing General Session with Keynote
11:00 a.m. – 12:30 p.m.	Lunch
11:30 a.m. – 4:30 p.m.	ConnectED Marketplace
12:30 p.m. – 4:35 p.m.	Breakouts Sessions
6:30 p.m. – 10:00 p.m.	Final Night Event

Wednesday, October 30th

Morning	Departures
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