

# Q4 2022 SYNERGY AGENDA

Wednesday, January 18, 2023  
1:00 p.m. – 5:00 p.m. Eastern Standard Time

 Retirement Plans Focus  
 Wealth Management Focus

 All Advisors

1:00 pm – 2:30 pm

Investment Update

**Moderator:** Mike Vogelzang

**Panelists:** Kevin Fieldman, David Hood, Sam Kirby, Christian Ledoux, Ellen Shaer, and Jim Underwood

2:30 pm – 3:15 pm

Wealth Management Panel

**Moderator:** Michael Henderson

**Panelists:** Ted Lew, Brian Pollard, Bri Smith, and Hannah Wadsworth

3:15 pm – 4:00 pm

Endowments and Foundations Panel

**Moderator:** Heather Shanahan

**Panelists:** Tim Egan, Andy Marino, and Grant Verhaeghe

4:00 pm – 4:45 pm

Retirement Plans Panel

**Moderator:** Beryl Ball

**Panelists:** Earle Allen, Sam Kirby, Susan Shoemaker, and Attila Toth

4:45 pm – 5:00 pm

Wrap Up

**Presenter:** John Curry