



WELCOME

MONDAY

JANUARY 25, 2016

TIME	TOPIC
7:15 am	Advisor Kickoff Registration <i>Location: Grand Ballroom Pre-Function</i>
3:00 pm	Advisor Kickoff Opening SPEAKER: Wilson Hoyle <i>Location: Grand Ballrooms 4 and 5</i>
3:15 pm	Advisor Kickoff Keynote Address SPEAKER: Fielding Miller <i>Location: Grand Ballrooms 4 and 5</i>
4:00 pm	CAPTRUST Advisor Technology Resources Review <i>Location: Grand Ballrooms 1, 2, and 3</i>
5:30 pm	Break
6:00 pm	Advisor Kickoff Reception <i>Location: Grand Ballroom Pre-Function</i>
7:00 pm	Advisor Kickoff Dinner and Awards Program <i>Location: Grand Ballrooms 4 and 5</i>



WELCOME

TUESDAY

JANUARY 26, 2016

TIME	TOPIC
8:15 am	Opening, Recap, and Agenda Review SPEAKER: Wilson Hoyle <i>Location: Grand Ballrooms 4 and 5</i>
8:30 am	The Challenger Sale GUEST SPEAKER: Emeka Osakwe <i>Location: Grand Ballrooms 4 and 5</i> Emeka Osakwe is an Executive Advisor with CEB's Sales Leadership Council for Midsized Companies and is based in the Washington, DC office. In his role, Emeka works with member executives and their teams on how to apply peer experience and leverage CEB's best practices to address pressing business challenges consequently helping them inflect change within their commercial organizations.
10:30 am	Break
10:45 am	Advisor Insights MODERATOR: Wilson Hoyle PANELISTS: Jean Duffy, Jim Edwards, Dan Esch, Chris Kulick, Jon Strickland, and Kyle Tucker <i>Location: Grand Ballrooms 4 and 5</i>



WELCOME

TUESDAY (continued)

JANUARY 26, 2016

TIME	TOPIC
12:00 pm	Lunch <i>Location: Grand Ballrooms 1 and 2</i>
1:00 pm	Institutional Advisor Breakout Session <i>Location: Grand Ballrooms 4 and 5</i> <u>2016 Initiatives Review</u> SPEAKERS: Jim Edwards, Mike Hudson, and Scott Matheson Wealth Advisor Breakout Session <i>Location: Capital Ballrooms 1 (Boxwood) and 2 (Dogwood)</i> <u>Challenger Application</u> SPEAKERS: Rush Benton and Wilson Hoyle
1:45 pm	Break
1:50 pm	Institutional Advisor Breakout Session <i>Location: Grand Ballrooms 4 and 5</i> <u>Challenger Application</u> MODERATOR and SPEAKER: Mike Hudson PANELISTS: John Davenport, Dan DiGiacomo, and Chris Kulick



WELCOME

JANUARY 26, 2016

TUESDAY (continued)

TIME	TOPIC
1:50 pm	Wealth Advisor Breakout Session <i>Location: Capital Ballrooms 1 (Boxwood) and 2 (Dogwood)</i> <u>Liquidity Event Opportunities</u> MODERATOR and SPEAKER: Rush Benton PANELISTS: Nick DeCenso, Mike Gray, Todd Jones, and Mike Molewski
2:35 pm	Break
2:40 pm	Institutional Advisor Breakout Session <i>Location: Grand Ballrooms 4 and 5</i> <u>Corporate Action</u> MODERATOR and SPEAKER: Mike Hudson PANELISTS: Mike Pratico, Jon Strickland, and Jimmy Talton Wealth Advisor Breakout Session <i>Location: Capital Ballrooms 1 (Boxwood) and 2 (Dogwood)</i> <u>2016 Initiatives Review</u> SPEAKERS: Rush Benton and Nick DeCenso



WELCOME

JANUARY 26, 2016

TUESDAY (continued)

TIME

TOPIC

3:30 pm

Closing

SPEAKER: Wilson Hoyle

Location: Grand Ballrooms 4 and 5

Advisor Kickoff Concludes

Thank You for Attending!