

# Q3 2020 SYNERGY AGENDA

Monday, October 19, 2020  
10:00 a.m. – 5:00 p.m. Eastern Standard Time

 Retirement Plans Focus  
 Wealth Management Focus

 All Advisors  
 All Company

 Break

10:00 a.m. – 10:30 a.m.

Company Update

**Presenter:** Fielding Miller

10:30 a.m. – 11:15 a.m.

Research Update

**Moderator:** Kevin Barry

**Panelists:** David Hood and Sam Kirby

11:15 a.m. – 11:30 a.m.

Break

11:30 a.m. – 12:30 p.m.

Wealth Management Panel

**Moderator:** Frank Bub

**Panelists:** Lisa Fox Danford, David Hansen, and AJ Morris

12:30 p.m. – 1:30 p.m.\*

Break

**\*Vested Shareholders' Distribution Meeting 12:30 p.m. - 1:15 p.m. This will be a separate event with information coming from Kara Chase.**

1:30 p.m. – 2:30 p.m.

Endowments and Foundations Panel

**Moderator:** Eric Bailey

**Panelists:** Cathy Ritter, Grant Verhaeghe, and Eddie Welch

2:30 p.m. – 2:45 p.m.

Break

2:45 p.m. – 3:45 p.m.

Retirement Plans Panel

**Moderator:** Mike Hudson

**Panelists:** Dan Esch, Kevin Fieldman, and Jason Stanicek

3:45 p.m. – 4:00 p.m.

Break

4:00 p.m. – 5:00 p.m.

The CAPTRUST Edge

**Moderator:** Eric Bailey

**Panelists:** Tiffany Larew, Kevin Monroe, and Rick Shoff

