

Q3 2021 SYNERGY AGENDA

Monday, October 18, 2021
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. – 11:00 a.m.

Investment Group Update

Moderator: Mike Vogelzang

Panelists: Matt Ogden and Jim Underwood

11:00 a.m. – 11:15 a.m.

Break

11:15 a.m. – 12:15 p.m.

Wealth Management Panel

Moderator: Frank Bub

Panelists: Nick DeCenso, Mark Feldman, and Eddie Welch

12:15 p.m. – 1:30 p.m.*

Break

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

1:30 p.m. – 2:30 p.m.

Endowments and Foundations Panel

Moderator: Eric Bailey

Panelists: Kelly Brothers, Will Chitwood, and Ellen Shaer

2:30 p.m. – 2:45 p.m.

Break

2:45 p.m. – 3:45 p.m.

Retirement Plans Panel

Moderator: Devyn Duex

Panelists: Jean Duffy, Debra Gates, Drew McCorkle, and Jon Strickland

3:45 p.m. – 4:00 p.m.

Break

4:00 p.m. – 5:00 p.m.

Business Development

Moderator: Teri Grubb

Panelists: Veronica Karas, Marcus Magyar, and Charles Pyke

