

AGENDA

Navigating New Horizons

WEDNESDAY, APRIL 29

- 12:00pm – 4:30pm** **Check In – The Westin Hotel**
Grab your welcome bags, nametags, etc.
- 5:30pm** **Latest arrival at the streetcar station** (2–3 minute walk from the Westin) for transportation via the TECO Line Streetcar System to the Florida Aquarium (arrival by 6:00 PM) Runs every 15 mins / Exit at Florida Aquarium Station #7
- 6:00pm – 9:00pm** **Reception – Florida Aquarium, Tampa, Florida**

THURSDAY, APRIL 30

- 7:30am – 8:30am** **Breakfast – The Westin Hotel**
- 8:30am – 9:00am** **NBC Securities Welcome and Opening Remarks**
Speakers: Frank Falkenburg, Chairman, John Doody, CEO, Peyton Falkenburg, EVP
- 9:00am – 9:45am** **First Trust**
The One Thing
Speaker: Brian Gallary, Sr. Vice President Head of Strategy and Consulting
- 9:45am – 10:00am** **Break**
- 10:00am – 10:45am** **Capital Group**
From Vision to Velocity— Driving Growth in Advisory Excellence. Key Insights from the Industry's Fastest Growing Teams.
Speaker: Paul Cieslik, Sr. Vice President, Advisor Practice Management at Capital Group
- 10:45am – 11:15am** **RBC**
Leading with Planning
Speaker: Aaron Funk, CFP®, RICP®, AWM, AIF®, Director, Wealth Strategy at RBC C&C
- 11:15am – 11:45am** **Invesco**
The Breakthrough Moment: Practice Innovation Index Best Practices
Speaker: George Amidon, Senior Consultant, Invesco Global Consulting
- 11:45am – 1:15pm** **Lunch**
With your NBC Securities Advisory Council Members
- 1:15pm – 1:45pm** **Don Connelly**
"How to Become the Obvious Choice"

1:45pm – 2:15pm	Reaves Asset Management & Polen Asset Management “Portfolio Construction” Panel Moderator: Darren Hinshaw, NBCSAM Director of Research Speakers: Joe Hickman, Investor Relations, Reaves Asset Mgmt, Simon Rafferty, CFA, Investment Specialist Polen Asset Mgmt, Pierre Allard, NBCSAM Chief Investment Officer
2:15pm – 3:15pm	Cocktails with NBCS Compliance Speaker: Blaine Miller, Chief Compliance Officer
3:15pm – 4:30pm	Team Building Foster Love
5:30pm – 8:30pm	American Social Reception

FRIDAY, MAY 1

7:30am – 8:30am	Breakfast – <i>The Westin Hotel</i>
8:30am – 9:15am	Navigating New Horizons Speaker: Peyton Falkenburg, EVP
9:15am – 9:45pm	NBCS Asset Management Speakers: Pierre Allard, CIO, Darren Hinshaw, Director of Research, Chris Fidler, Director Fixed Income Trading
9:45am – 10:15am	MBC Strategic <i>The Client Journey Has Changed –Leveraging AI and Digital Shifts to Optimize Advisor Marketing</i> Speakers: Matt Brunini and Danny Harper
10:15am – 10:45am	RBC <i>Reflection and Clearing and Custody Team Panel</i> Speakers: Dillon Benz, Director, Consulting & Education, Tara Wells, Sr. Director, Product Mgmt & AI Enablement, Amanda Meyer, Sr. Manager, Technology Training , Jack Schmiel, Sr. Technology & Business Consultant
10:45am – 11:00am	Break
11:00am – 11:30am	ASH Brokerage <i>The Best Color is Grey</i> Speaker: Jim Dabler, ChFC, RICO, CASL Director, Retirement Advanced Markets and Planning
11:30am – 12:00pm	Equitable <i>The Final Frontier</i> Speaker: Eric Brown, Southeast Divisional Vice President
12:00pm – 12:30pm	Principal <i>401(k) Market Dynamics & Prospecting</i> Speakers: Benji Coghlan, Director, Retirement Solutions AL, MS, & FL Panhandle
12:30pm – 1:00pm	NBC Securities Closing Remarks Speakers: Frank Falkenburg, Chairman, John Doody, CEO, Peyton Falkenburg, EVP