

V.I.S.I.O.N. 20 23 CONFERENCE AGENDA

WASHINGTON, D.C.

WEDNESDAY - SEPT 13

6:30 AM - 7:30 AM - MORNING YOGA PRESENTED BY LIFEWTR

10:00 AM - 5:00 PM - WOODROW WILSON REGISTRATION DESK (2)
Conference & Career Fair Registration

11:00 AM - 12:00 PM - BALTIMORE 1

Breakout Sessions #1 - Wealth Management Unveiled. Breaking into the Field and Starting Your Journey After Graduation. (Next Gen. Talent)

11:00 AM - 12:00 PM - BALTIMORE 2

Breakout Sessions #2 - Career Insights: Making the switch; Advice from Successful Career Changers in Wealth Management. (Career Changers)

12:00 PM - 1:00 PM - LOWER ATRIUM + POTOMAC TERRACE

LUNCH

1:00 PM - 1:15 PM - BALTIMORE FOYER

Networking Break

1:15 PM - 2:15 PM - BALTIMORE 1+2

General Session #1 - Elevate Your Career: Unleashing the Power of Mentorship & Sponsorship Presented by UBS Wealth Management (Next Gen. Talent & Career Changers)

2:15 PM - 2:30 PM - BALTIMORE FOYER

Break (Personal Time)

2:30 PM - 3:25 PM - BALTIMORE 1+2

Fireside Chat - Wealth Management Unveiled: Exploring Career Paths, Crafting your Brand, and Challenges as a Novice Advisor

3:00 PM - 11:59 PM - GAYLORD LOBBY

Hotel Check-In

3:30 PM - 6:00 PM - WOODROW WILSON B+C

Career Fair - #Career Changers & #Next Gen Talent

5:00 PM - 6:00 PM - WOODROW WILSON FOYER

Tribe Collaboration Sessions

5:45 PM - 6:30 PM - WOODROW WILSON LOBBY

Welcome Reception : Meet and Greet

6:30 PM - 8:30 PM - LOCAL ESTABLISHMENTS

Dine Around Town with a Corporate Member of AAAA

6:30 PM - 8:00 PM - WOODROW WILSON D

VIP Networking Reception and Dinner - Invitation Only

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THURSDAY - SEPT 14

6:30 AM - 7:30 AM - MORNING YOGA PRESENTED BY LIFEWTR

8:00 AM - 4:30 PM - WOODROW WILSON REGISTRATION DESK
Conference Registration

7:30 AM - 8:30 AM - MARYLAND BALLROOM A
BREAKFAST

8:35 AM - 8:40 AM - WOODROW WILSON BALLROOM A
WELCOME + CONFERENCE REMARKS

8:40 AM - 9:00 AM - WOODROW WILSON BALLROOM A
General Session - #1: Unlocking Resources: Funding Opportunities for Book Acquisitions

9:05 AM - 10:05 AM - WOODROW WILSON BALLROOM A
General Session #2: The Unique Needs of Diverse Investors; A Discussion Hosted by J.P. Morgan Wealth Management

9:50 AM - 10:15 AM - WOODROW WILSON FOYER
BREAK

10:15 AM - 11:05 AM - BALTIMORE 1+2
Breakout Sessions #1 - Technology: Stay Ahead of the Curve: Compliance in the Digital Age. (Compliance and Administrative Professionals) [C.E. Eligible]

10:15 AM - 11:05 AM - BALTIMORE 5
Breakout Sessions #1 - Practice Management: Mastering the Art of Sales Leadership in Wealth Management. (Sales Managers)

10:15 AM - 11:05 AM - ANNAPOLIS 3
Breakout Sessions #1 - Advocacy: Promoting Diversity, Equity, and Inclusion in Wealth Management. (DEI) Leaders

10:15 AM - 11:05 AM - WOODROW WILSON BALLROOM A
Breakout Sessions #1 - Navigating Leadership Challenges in a Rapidly Evolving Industry (VIP's and CEO's)

10:15 AM - 11:05 AM - WOODROW WILSON BALLROOM D
Breakout Sessions #1 - Succession Planning: Importance of succession planning in preserving family wealth. (Wire house FAs / Bank brokerage FAs)

10:15 AM - 11:05 AM - BALTIMORE 3+4
Breakout Sessions #1 - Driving Growth: Proven Strategies for RIAs & Independent Financial Planners and Financial Advisors. (RIAs / Independent FA's)

11:05 AM - 11:25 AM - WOODROW WILSON FOYER
Networking: Coffee and Connect/Break

11:30 AM - 12:20 PM - BALTIMORE 1+2
Breakout Sessions #2 - Streamlining Compliance & Administrative Processes: Innovations in Client Servicing Techniques. (Compliance and Administrative Professionals)

11:30 AM - 12:20 PM - BALTIMORE 5
Breakout Sessions #2 - Recruiting: How to Build and Lead High-Performing Sales Teams in the Wealth Management Industry. (Sales Managers)

11:30 AM - 12:20 PM - ANNAPOLIS 3
Breakout Sessions #2 - Advocacy: Dismantling Barriers. Creating Inclusive Financial Services Industry for the B/AA Professional. (DEI Leaders)

11:30 AM - 12:20 PM - WOODROW WILSON D
Breakout Sessions #2 - Practice Management: Crafting Resilient Portfolios; Best Practices for B/AA Financial Advisors. (Wire house FAs / Bank brokerage FAs) [C.E. Eligible]

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11:30 AM - 12:20 PM - BALTIMORE 3+4

Breakout Sessions #2 - Retirement Planning: Best practices for Prospecting Retirement Plans. (RIAs / Independent FA's) [C.E. Eligible]

11:30 AM - 12:20 PM - ANNAPOLIS 4

Breakout Sessions #2 (Workshop) Navigating Leadership Challenges in a Rapidly Evolving Industry (VIP's and CEO Session on Best Practices. Invitation Only.)

12:20 PM - 12:30 PM - WOODROW WILSON FOYER

BREAK

12:30 PM - 1:30 PM - WOODROW WILSON BALLROOM A

Lunch General Session #3: Panel Discussion: Unleashing Brilliance: Elevating Black Women in Global Finance and Wealth Management [C.E. Eligible]

1:45 PM - 2:35 PM - ANNAPOLIS 3

Breakout Sessions #3 - Advocacy: The role of Emotional Intelligence in ethical decision-making in the wealth management industry. (DEI Leaders) [C.E. Eligible]

1:45 PM - 2:35 PM - WOODROW WILSON D

Breakout Sessions #3 - Practice Management: The Art of Becoming a Million Dollar Producer who happens to be Black/African American (Wirehouse FAs / Bank brokerage FAs) [C.E. Eligible]

1:45 PM - 2:35 PM - BALTIMORE 3+4

Breakout Sessions #3 - Branding: The power behind building a strong brand for your wealth management firm. (Sales Managers, RIAs / Independent FA's) [C.E. Eligible]

1:45 PM - 2:35 PM - BALTIMORE 1+2

Breakout Sessions #3 - Mental Health: Supporting mental health for productivity and wellbeing in wealth management firms. (Compliance and Administrative Professionals)

2:35 PM - 3:00 PM - WOODROW WILSON FOYER

NETWORKING: TRACK COLLABORATION SESSIONS

3:05 PM - 4:35 PM - WOODROW WILSON BALLROOM A

General Session #4: [PRT] Presidents' of Wealth Roundtable Discussion
No Media Permitted.

4:35 PM - 6:00 PM - WOODROW WILSON LOBBY

Networking: Track Collaboration Session/Attendee Free Time

6:35 PM - 7:00 PM - CHERRY BLOSSOM LOBBY

Pre Gala And Awards Networking Reception.

7:00 PM - 10:00 PM - CHERRY BLOSSOM BALLROOM

Celebrating Excellence: AAAA Gala and Awards Night

V.I.S.I.O.N. 2023 CONFERENCE AGENDA

WASHINGTON, D.C.

FRIDAY - SEPT 15

6:30 AM - 7:30 AM - MORNING YOGA PRESENTED BY LIFEWTR

7:30 AM - 8:30 AM - MARYLAND BALLROOM A
BREAKFAST

8:35 AM - 9:00 AM - WOODROW WILSON BALLROOM A
General Session #1 - Advocacy: The Financial Literacy Gap. How B/AA Financial Professionals Can Make a Difference by Promoting Financial Wellness in the B/AA Community.

9:00 AM - 10:00 AM - WOODROW WILSON BALLROOM A
General Session #2 - An Insightful Session with United States Securities and Exchange Commissioner Hester M. Peirce

10:00 AM - 10:15 AM - WOODROW WILSON FOYER
BREAK

10:15 AM - 11:05 AM - WOODROW WILSON BALLROOM A
General Session #3 - Merrill Lynch

11:05 AM - 11:25 AM - WOODROW WILSON LOBBY
BREAK

11:30 AM - 12:20 PM - WOODROW WILSON BALLROOM A
General Session #4 - Technology: Protecting Client Data. Cyber security best practices for the Wealth Management Industry.

12:30 PM - 1:30 PM - WOODROW WILSON BALLROOM A
Awards Lunch: General Session #5 - Recognizing AAAA's TOP 50 U 50 Financial Professionals in Wealth Management.

1:30 PM - 1:45 PM - WOODROW WILSON FOYER
BREAK

1:45 PM - 2:35 PM - BALTIMORE 1+2
Breakout Sessions #4 - Technology: Implementing AI to improve risk profiling and investment strategies in wealth management. (Compliance and Administrative Professionals)

1:45 PM - 2:35 PM - ANNAPOLIS 3
Breakout Sessions #4 - Advocacy: Best practices for building a diverse and inclusive leadership team in wealth management. (DEI Leaders)

1:45 PM - 2:35 PM - BALTIMORE 5
Breakout Sessions #4 - Mental Health: Supporting mental health for productivity and wellbeing in sales and service teams. (Sales Managers)

1:45 PM - 2:35 PM - BALTIMORE 3+4
Breakout Sessions #4 - Practice Management : Tailoring financial plans for the unique needs of athletes. (Wire house FAs / Bank brokerage FAs)

2:35 PM - 3:00 PM - WOODROW WILSON FOYER
Networking: Tribe Collaboration Session - Succession Planning for Financial Advisors and Financial Planners

3:05 PM - 4:35 PM - WOODROW WILSON BALLROOM A
General Session #5 - General Session #5 - General Session: State of B/AA Wealth in the U.S.

4:45 PM - 5:30 PM - WOODROW WILSON BALLROOM A
General Session #6 - General Session Advocacy: Future of AAAA.

5:30 PM - 6:30 PM - WOODROW WILSON LOBBY
Networking Reception + Free Time.

7:30 PM - 11:59 PM - [POSE ROOFTOP LOUNGE] + [ANNAPOLIS 1-4] + [BALTIMORE 3-5]
Harmony in Motion: AAAA's Multicultural Dance Extravaganza Sponsored by AAAA; Three dance floors playing a wide selection of cultural music.