

# SESSIONS

DEC 1 - 01/12/2020

Wealth/Stack Live

December 1-3, 2020  
Eastern Standard Time  
Virtual Conference

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## **A Workforce In Transition: Effective Presidential Policy and Federal Buying Power**

1:00pm - 2:00pm  
Main Plenary

The 2020 election has come and gone, and the question remains, how will the president's monetary policy affect us going into 2021 and beyond? In addition to presidential agenda items, what additional changes will be made to the Federal Reserve balance sheet? In this session, our financial experts aim to estimate employment retention with the Federal Reserve's recent decision to buy corporate bonds and the key pieces of the president's monetary plan that will directly impact your business.

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## **Networking Break**

2:00pm - 3:00pm  
Main Plenary

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## **Office Life At Home: Are You Staying Efficient?**

3:00pm - 3:30pm  
Main Plenary

Your office is likely no longer a high-rise, but instead your personal home. With more permanent remote working being adopted by many companies, are your systems and tools working efficiently to keep your business running? Are you accounting for all your cyber-security needs? Our digital gurus are here to help you mainline your teams needs and bring you productivity solutions. Learn how to clear your desks, tighten your security, and give your employees the best support possible.

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## **Investing in Alternative Assets: Protect Your Wealth**

3:30pm - 4:00pm  
Main Plenary

As markets continue to fluctuate, how can you invest in volatile markets in a risk-averse way? Where can you go to generate the best outflows? Join our knowledgeable panelists as they discuss how secondary market products can mobilize your savings and give you the cash you need in a pinch.

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<b>1:00PM</b>	<b>1:00pm</b> - A Workforce In Transition: Effective Presidential Policy and Federal Buying Power
<b>2:00PM</b>	<b>2:00pm</b> - Networking Break
<b>3:00PM</b>	<b>3:00pm</b> - Office Life At Home: Are You Staying Efficient? <b>3:30pm</b> - Investing in Alternative Assets: Protect Your Wealth

# SESSIONS

DEC 2 - 02/12/2020

Wealth/Stack Live

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## Tech Stack: How Being User Friendly Enhances Client Experiences

1:00pm - 2:00pm  
Main Plenary

How are you tracking your client's investments and growth data? Is it readily available to view or is it secured in a filing cabinet? If you said the latter, there's a better solution and it starts with revamping your digital offerings. Join our tech wizards as they talk about the 5 best new tools you can integrate into your business to help keep you organized and accurately reporting to clients on their investments.

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## Networking Break

2:00pm - 3:00pm  
Main Plenary

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## Standing Out: Create Your Own Model

3:00pm - 3:30pm  
Main Plenary

Nowadays there are many diverse ways to invest your client's money, but are the options you've selected showing the rate of return your customers are hoping for? Tune in as experts break down the key strategies to differentiating portfolios and how these strategies can help you create a more customized and personal model for each of your individual client's needs.

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## Structuring A Sustainable Future: ESG Leads the Way

3:30pm - 4:00pm  
Main Plenary

Creation of ESG funds has sky-rocketed over the last several years. With so many products gaining exposure, how can you tell which is the best one to invest in? Is ethical and impact investing also important to your portfolio? If so, get involved with our panelists as they discuss the types of funds that will help you make positive, lasting impacts for years to come.

# SCHEDULE

DEC 2 - 02/12/2020

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TIME	MAIN PLENARY
1:00PM	1:00pm - Tech Stack: How Being User Friendly Enhances Client Experiences
2:00PM	2:00pm - Networking Break
3:00PM	3:00pm - Standing Out: Create Your Own Model 3:30pm - Structuring A Sustainable Future: ESG Leads the Way

# SESSIONS

DEC 3 - 03/12/2020

Wealth/Stack Live

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## Fixed Income: Projecting Positive Gains

1:00pm - 2:00pm  
Main Plenary

As the U.S. began to experience economic downturn earlier this year, many investors turned toward money market or fixed income assets and liquid assets were transitioned out of portfolios. Should we continue making these portfolio adjustments into the future or is there merit to investing in higher yield corporate bonds? As markets begin to rebound, our experts look at the current projections and discuss why fixed income investments may be the safer bet when looking to regain what you've lost.

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## Networking Break

2:00pm - 3:00pm  
Main Plenary

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## Digital Currency: Crypto Steps Up To The Plate

3:00pm - 3:30pm  
Main Plenary

Cryptocurrency is back in favor and has seen exponential growth as the market has rebounded. With diversification being key to portfolio protection, how can adding crypto assets keep your investments secure? Join our digital experts as they talk about the biggest crypto trends of 2020, how 2021 will play out and the innovative products that are making access easier, lending credibility to this burgeoning industry.

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## On Hold, But Never Stopped: Growth During Times of Adversity

3:30pm - 4:00pm  
Main Plenary

In-person meetings, product creation, and hiring have come to a halt for many companies looking to control costs, but that doesn't mean there isn't still growth potential. Are you diverting some of your time to other ventures such as brand expansion and your social presence? If not, now is the time and our marketing gurus are here to help you revamp and drive the necessary traffic your business needs to last.

# SCHEDULE

DEC 3 - 03/12/2020

Wealth/Stack Live

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TIME	MAIN PLENARY
1:00PM	1:00pm - Fixed Income: Projecting Positive Gains
2:00PM	2:00pm - Networking Break
3:00PM	3:00pm - Digital Currency: Crypto Steps Up To The Plate 3:30pm - On Hold, But Never Stopped: Growth During Times of Adversity