



Agenda
At - A -
Glance

July 22nd – 25th

2018

Each year, our premier event brings together financial advisors from around the nation, Investacorp home office employees, industry experts and sponsor partners to learn, network and revitalize their practices.

PlanForward18

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Sunday July 22nd

10:00 am – 4:00 pm	Registration Desk Opens <i>Registration South</i>
11:00 am – 1:00 pm	Hospitality Light Lunch and Snacks provided <i>Registration South</i>
Pre-Conference Sessions	
1:00 – 3:00 pm	<ul style="list-style-type: none">• Multigenerational Practice Workshop <i>Estate Salon I</i>
1:00 – 2:00 pm	<ul style="list-style-type: none">• LEAP Technology Training <i>Estate Salon II</i>
1:00 - 2:00 pm	<ul style="list-style-type: none">• Practice Management Workshops Build the Pipeline: Savvy Client Prospecting <i>Estate Salon III</i>
2:00 – 3:00 pm	Good Client Relationships Are Not the Same as Client Engagement <i>Estate Salon III</i>
4:00 – 6:15 pm	Opening General Session For Investacorp Advisors and Sponsor Partners Only Pat Farrell to provide an Investacorp update. In addition, we will have a panel discussion with Investacorp advisors <i>Royal Palm I-V</i>
6:15 – 7:30 pm	Open House Reception with Sponsor Partners <i>Royal Palm VI-X</i>
7:30 – 10:00 pm	Opening Night Celebration – “Margaritaville” <i>Boca Beach Club</i> <i>Shuttles Provided</i>

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Monday July 23rd

7:00 am – 5:00 pm	Registration Desk Opens <i>Registration South</i>
7:30 – 8:50 am	Served Breakfast Key Note Speaker: Dr. Kevin Elko <i>Royal Palm I-V</i>
9:00 am – 1:00 pm	Sponsor Partner Presentations (All Breakout Presentation Descriptions listed in Mobile App) *Networking Break in Exhibit Area from 10:40am – 11:20am <ul style="list-style-type: none">• Track 1: Investment Strategies <i>Estate Salon I</i>• Track 2: Practice Building <i>Estate Salon II</i>• Track 3: Financial Planning <i>Estate Salon III</i> (sessions will run concurrently)
1:00 pm – 2:20 pm	Served Lunch “Economic Update and a Closer Look at the Ladenburg Advantage” Key Note Speakers: Phil Blancato, CEO Ladenburg Thalmann Asset Management. Update on Economy and Discussion on Ladenburg Wealth Advantage. LRPC Introduction with Doug Baxley <i>Royal Palm I-V</i>
2:30 – 5:00 pm	Strategic Partner Presentations (All Breakout Presentation Descriptions listed in Mobile App) <ul style="list-style-type: none">• Track 1: Investment Strategies <i>Estate Salon I</i>• Track 2: Practice Building <i>Estate Salon II</i>• Track 3: Financial Planning <i>Estate Salon III</i> (sessions will run concurrently)
6:00 – 7:30 pm	Open House Reception with Strategic Partners (followed by Dine-Arounds) <i>Royal Palm VI-X</i>

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Tuesday July 24th

7:30 – 5:00 pm	Registration Desk Opens <i>Registration South</i>
8:00 – 8:45 am	Buffet Breakfast <i>Royal Palm I-V</i>
9:00 am – 1:00 pm	Sponsor Partner Presentations (All Breakout Presentation Descriptions located in Mobile App) *Networking Break in Exhibit Area from 10:40 -11:20 <ul style="list-style-type: none">• Track 1: Investment Strategies <i>Estate Salon I</i>• Track 2: Practice Building <i>Estate Salon II</i>• Track 3: Financial Planning <i>Estate Salon III</i> (sessions will run concurrently)
1:00 – 2:15 pm	Served Lunch Fireside Chat with Dick Lampen (CEO Ladenburg Thalman), Adam Malamed(COO Ladenburg Thalman) and Patrick Farrell (CEO Investacorp) <i>Royal Palm I-V</i>
2:30 – 3:30 pm	Annual Compliance Meeting and Firm Element BD Training <i>Estate Salon I – III</i>
3:40 – 4:30 pm	General Session Featured Key Note Speaker: Carly Fiorina <i>Royal Palm I – V</i>
4:30 – 5:00 pm	Photo Opportunity with Carly Fiorina Sponsored by CNL <i>Veranda Salon IV</i>
7:30 – 8:30 pm	Cocktail Reception <i>Spanish Terrace</i>
8:30 pm – 12:00 am	An Evening in Casablanca <i>Royal Palm Ballroom</i>

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Wednesday July 25th

8:30 am

Golf Tournament Sponsored by Smart Stop

Boca Raton Golf Club

Box lunches provided