

Tuesday, June 17th

- 12:00 - 1:00 p.m. **Arrival/Lunch** - Timberstone
- 1:00 - 1:15 p.m. **Opening Comments/Agenda Review**
Thomas Fleming - Timberstone
- 1:15 - 2:00 p.m. **Rep Contract/Go Forward Priorities/Initiatives**
Pat Bello, Jerry Beck - Timberstone
- 2:00 - 3:00 p.m. **The Retirement Plan Company - Our New Recordkeeper/Partner**
The Retirement Plan Company - Patrick Hale, Head of Private Sector Retirement Solutions;
Jon Croft, Managing Director of Operations - Timberstone
- 3:00 - 3:15 p.m. **Break** - Timberstone
- 3:15 - 4:00 p.m. **Advisor 360 & New Proposal**
GWN - Walter McBay, Managing Director; Matthew McBay, Director - Timberstone
- 4:00 - 4:45 p.m. **The Behavioral Portfolio**
Toews - Phillip Toews, Chief Executive Officer - Timberstone
- 4:45 - 5:00 p.m. **Closing Comments** - Pat Bello/Thomas Fleming - Timberstone
- 6:30 p.m. **Cocktail Hour** - Alpine Room and Deck
- 7:30 p.m. **Dinner** - Alpine Room and Deck

Wednesday, June 18th

- 8:00 - 9:00 a.m. **Breakfast** - Slopeside Dining Room (Please remember to bring your ticket for the day to breakfast.)
- 9:00 - 9:45 a.m. **FIG Sales & Marketing Updates**
FIG - Chris Vance, Senior Vice President - Timberstone
- 9:45 - 10:30 a.m. **Pairing Annuities With Advisory**
Liberty One Investment Management - Sean Belton, RVP - Timberstone
- 10:30 - 10:45 a.m. **Break** - Timberstone
- 10:45 - 11:30 a.m. **PSEA Planning: Make the upcoming year your best ever! PSEA Update and Advisor Panel**
Lisa DePorzio - Timberstone
- 11:30 - 12:15 p.m. **Economic Update** - Advanced Asset Management Advisors (AAMA) - Rob Williams, Chief Economist - Timberstone
- 12:15 - 1:00 p.m. **Lunch** - Timberstone
- 1:00 - 1:45 p.m. **3....2....1.... With Security Benefit: 3 Value Add Ideas, 2 Product Updates and K through 12 Industry Update**
Security Benefit Group: Matthew Rocha, SVP, Sales Manger; John Kiley, RVP & Stephanie Lightfoot, RVP - Timberstone
- 1:45 - 3:15 p.m. **Partner Breakout Sessions**
Vendors - Seasons 1, Seasons 2, Seasons 3 & Seasons 4
- 3:30 - 3:30 p.m. **Break** - Timberstone
- 3:15 - 4:00 p.m. **PSERS: You have questions, we've got answers. PSERS Update and Advisor Q&A**, Corry Schachern, Asst. Director of Retirement Programs PSEA/Lisa DePorzio - Timberstone
- 4:00 - 4:45 p.m. **Market Update**, Castellum Asset Management - David Homard, President - Timberstone
- 4:45 - 5:00 p.m. **Closing Comments** - Timberstone
- 6:30 p.m. **Cocktail Hour** - Foggy Goggle & Deck
- 7:30 p.m. **Dinner** - Foggy Goggle & Deck

Thursday, June 19th

8:00 - 9:00 a.m. **Breakfast** - Slopeside Dining Room (Please remember to bring your ticket for the day to breakfast.)

9:00 - 10:00 a.m. **Kades-Margolis Rep Council Meeting**
Timberstone

10:00 - 10:15 a.m. **Break** - Timberstone

10:15 - 12:00 a.m. **Partner Breakout Sessions**
Vendors - Seasons 1, Seasons 2, Seasons 3 & Seasons 4

12:00 - 1:00 p.m. **Lunch** - Timberstone

Kades-Margolis Team Activities

6:00 p.m. **Cocktail Hour**
Winterberry

7:00 p.m. **Dinner**
Winterberry

Friday, June 20th

- 8:00 - 9:00 a.m. **Breakfast** - Slopeside Dining Room (Please remember to bring your ticket for the day to breakfast.)
- 9:00 - 9:45 a.m. **Media Replay: Don't Let Media Headlines Cripple Your Clients' Future**, Hartford Funds - Tom Barrett, Managing Director - Applied Insights; Dave Marks, Regional VP - Advisor Consultant - Timberstone
- 9:45 - 10:30 a.m. **Communicating Your Value**, Asset Mark - Rachel Wolf, Enterprise Business Consultant/Pat Newman, National Consultant/Chris Randall, Regional Consultant - Timberstone
- 10:30 - 11:15 a.m. **Kades-Margolis Advisor Session: Complementary Business to Grow Portfolios and Business**, Kades-Margolis Advisor Panel; Tom Fleming/Moderator - Timberstone
- 11:15 - 12:00 p.m. **Closing Comments/Departures**, Pat Bello/Thomas Fleming - Timberstone