

2023 SMART CONFERENCE

MAY 31 - JUNE 2



Wednesday

10:30 - 12:30

The Basics:
Training for New(er) Advisors

12:30 - 1:30

Lunch

1:30 - 4:30

The Basics:
Training for New(er) Advisors

5:00

Cocktails at Black Cow Fat Pig

6:00

Supper at Black Cow Fat Pig

May 31

Thursday

8:00 - 8:30

Social Time & Light Breakfast

8:30 - 9:00

Welcome

9:00 - 12:00

Serious Shift: How To Grow Your Practice
By Shifting Beyond Advice
Dennis Moseley-Williams

12:00 - 2:00

Lunch at Napoli's

2:00 - 3:00

Stay In Your Seat
Weston Wellington - Dimensional

3:15 - 3:30

Niche Services by Partner Firms

3:30 - 4:00

Closing Remarks

5:30 | 6:30

Cocktails & Supper at Jared's

June 1

Friday

8:00 - 8:30

Social Time & Light Breakfast

8:30 - 9:00

Welcome

9:00 - 9:30

Real Estate & Beyond:
Increasing Diversification Through
Core Infrastructure
Steve Pointer - Cantor Fitzgerald

9:30 - 10:30

Using Cash/Equivalents with Clients
Nate Raabe - Wealth Management

10:30 - 11:30

Advisor Round-Table Best Practices

11:30 - 12:00

Q & A Session & Closing Remarks

12:00

Lunch To Stay or Go

June 2

locations
(all in Norfolk, NE)



McMill Building
(conference sessions)
125 S 4th St



Norfolk Lodge & Suites
(hotel)
4200 W Norfolk Ave



Black Cow Fat Pig
(Wednesday supper)
702 W Norfolk Ave



Napoli's
(Thursday lunch)
311 W Norfolk Ave



Jared's Shouse
(Thursday supper)
3300 W Eisenhower Ave

sponsors

