

# 2024 SMART CONFERENCE

MAY 29-31

## Wednesday

MAY 29

- 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 / 6:00 Cocktails / Dinner (Black Cow Fat Pig)

## Thursday

MAY 30

- 8:00 - 8:30 Social Time + Breakfast  
8:30 - 9:00 Welcome  
9:00 - 12:00 Brian Portnoy, Shaping Wealth: *Storytelling for Advisors*  
12:00 - 2:00 Lunch  
2:00 - 2:45 Jeff Kinney, Cantor Fitzgerald: *Private Markets, the Past, Present and Future*  
3:00 - 4:00 *Enhancing Existing Client Relationships Through Technology - A Training on New Software for Advisors*  
4:00 Closing Remarks  
5:30 / 6:30 Cocktails / Dinner (The Cove at Midtown Event Center)

## Friday

MAY 31

- 8:00 - 8:30 Social Time + Breakfast  
8:30 - 8:45 Welcome  
8:45 - 10:30 Christian Newton, Dimensional Fund Advisors: *Implications of Investor Behavior AKA "Behavioral Biases" + Answering Tough Client Questions*  
10:30 - 12:00 Q&A + Round-table  
12:00 Lunch (To stay or go)

**WEALTH MANAGEMENT**  
A REGISTERED INVESTMENT ADVISOR



## Locations

**McMill Building**  
(All conference sessions)  
125 S 4th St

**Norfolk Lodge & Suites**  
(Hotel block)  
4200 W Norfolk Ave

**Black Cow Fat Pig**  
(Wednesday dinner)  
702 W Norfolk Ave

**The Cove**  
(Thursday dinner)  
1102 Riverside Blvd

## Sponsors

