

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: <i>Storytelling for Advisors</i>
12:00 - 2:00	Lunch (District Event Center)
2:00 - 2:45	Jeff Kinney, Cantor Fitzgerald: <i>Private Markets, the Past, Present and Future</i>
3:00 - 4:00	<i>Enhancing Existing Client Relationships Through Technology - A Training on New Software for Advisors</i>
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: <i>Implications of Investor Behavior AKA "Behavioral Biases" + Answering Tough Client Questions</i>
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

District Event Center
(Thursday Lunch)
218 W Norfolk Ave

The Cove
(Thursday dinner)
1102 Riverside Blvd

Sponsors

