



CLIENT CONFERENCE

AGENDA

October 9th **Wednesday**

- 8:30 am - 10:00 am** Charlotte Training with Yavonda Baynard & Morgan Skillingstad
in the Governors Ballroom
- 10:00 am - 10:15 am** BREAK *Sponsored Event*
in the Governors Ballroom
- 10:15 am - 11:00 am** Charlotte Training Continued
in the Governors Ballroom
- 11:00 am - 12:00 pm** Lunch & Learn - "Short Term Fixed Income Updates & Benefits to Your Organization" with Wes Hobgood, Invesco
in the Governors Ballroom
- 12:00 pm - 5:00 pm** Afternoon at the Mokara Spa or Golf
- 6:00 pm - 7:30 pm** Welcome Reception at Palm Court
Sponsored Event - FIS
Dinner will be at your own discretion, please see attached list for dining options.

October 10th **Thursday**

- 7:30 am - 8:30 am** Breakfast Meet & Greet with Vendors
in the Barton Creek Room
- 8:30 am - 9:00 am** 'Welcome & TMN Updates' with Gavin Finlay, TMN
in the Governors Ballroom
- 9:00 am - 10:00 am** 'Compliance Matters' with Marilyn Smith, First Dimensions Consulting
in the Governors Ballroom

- 10:00 am - 10:15 am** BREAK *Sponsored Event*
in the Governors Ballroom
- 10:15 am - 11:00 am** 'Investing in Today's Market' with Rick Milton,
MainStreet Advisors
in the Governors Ballroom
- 11:00 am - 12:00 pm** 'New Tech Order: Digital Currencies, Platforms,
& Technologies Shaping Financial Services'
with Brian Stoeckert, Stratis Advisory
in the Governors Ballroom
- 12:00 pm - 12:15 pm** 'Vendor Introductions' with Gavin Finlay, TMN
in the Governors Ballroom
- 12:15 pm - 1:30 pm** Lunch *Sponsored Event - MainStreet Advisors*
in the Barton Creek Room
- 1:30 pm - 2:00 pm** 'Tax Update' with Doug Hart, Trust Processing
Solutions
in the Governors Ballroom
- 2:00 pm - 3:00 pm** 'Digital Solutions for Bank Wealth & Trusts' with
Steve Lewczyk, Harvest Saving & Wealth
Technologies
in the Governors Ballroom
- 3:00 pm - 3:15 pm** Break *Sponsored Event*
in the Governors Ballroom
- 3:15 pm - 4:00 pm** 'Road Map' with Cory Rivers, FIS
in the Governors Ballroom
- 4:00 pm - 5:00 pm** 'FIS Update' with Tracy Ketchie, FIS
in the Governors Ballroom
- 6:00 pm - 10:00 pm** Texas Hill Country BBQ Dinner at The Rock House
Sponsored Event - TMN

October 11th

Friday

- 7:45 am - 8:30 am** Breakfast *Sponsored Event*
in the Barton Creek Room
- 8:30 am - 11:00 am** TMN & Client Roundtable Discussions
in the Governors Ballroom
- 11:00 am** Adjourn
in the Governors Ballroom