

Sunday MAY 15

8 a.m. – 1 p.m.	Golf – Morning Tournament *PREREGISTRATION REQUIRED* <i>Gaylord Springs Golf Course</i>
12 – 8 p.m.	Registration and Information Desk Open <i>Delta Lobby B</i>
1:30 – 6:30 p.m.	Golf – Afternoon Tournament *PREREGISTRATION REQUIRED* <i>Gaylord Springs Golf Course</i>
3 – 5 p.m.	Annual IIMC – Institute of Investment Management Consulting <i>Presidential C</i>
5:30 – 7 p.m.	Networking with the Networks <i>Water's Edge</i>
6:20 – 9:30 p.m.	Chairman's Council Dinner *BY INVITATION ONLY* <i>Depart from the Delta Portico</i>
6:30 – 8:30 p.m.	Golf Tournament Awards Dinner <i>Fuse</i>

Monday MAY 16

7 a.m. – 5:30 p.m.	Registration and Information Desk Open <i>Delta Lobby B</i>
7:30 – 8:30 a.m.	Breakfast <i>Ryman Hall C</i> New FA Breakfast <i>Washington B</i> Morning Research Meeting hosted by Equity Capital Markets <i>Presidential C</i>
8 a.m. – 4 p.m.	Spouse/Guest Lounge <i>Delta Island A-C</i>
8:45 – 9:30 a.m.	GENERAL SESSION: Amplify – Jodi Perry & Tim Killgoar Technology Update – Vin Campagnoli & David Lillis <i>Delta A</i>
9:30 a.m. – 2 p.m.	Headshots <i>Presidential Ballroom Foyer</i>
9:30 a.m. – 4:30 p.m.	Technology Center and Internet Café <i>Presidential DE</i>

BREAKOUT SESSIONS

9:40 – 10:40 a.m.	
RJFS & RJFSA Compliance <i>Delta B</i>	Streamline Your Desktop <i>Ryman L</i>
Senior & At-Risk Clients <i>Governor's AE</i>	Create a World Class Prospect & Client Experience <i>Ryman MNO</i>

■ Firm Element, Compliance, VA & Supervision Session

■ Technology Session

Monday MAY 16

BREAKOUT SESSIONS

9:40 – 10:40 a.m. (cont.)	
Variable & Structured Annuities <i>Governor's B</i>	Manage Custom Portfolios with Portfolio Management <i>Ryman PQR</i>
Generate High-Quality Proposals and Pitchbooks <i>Ryman ABC</i>	FactSet Essentials & Key Workflows <i>Ryman DE</i>
Operational Excellence: Service 1st Panel <i>Ryman Ballroom</i>	
9:40 – 11:40 a.m.	
CFP® Ethics <i>Presidential C</i>	
10:50 – 11:50 a.m.	
Investment Advisory <i>Delta B</i>	Provide Personalized Service with RJ CRM <i>Ryman L</i>
Variable & Structured Annuities <i>Governor's B</i>	Cyberthreat Briefing: What You Need to Know <i>Ryman MNO</i>
RJFS & RJFSA Supervision <i>Governor's CD</i>	GPM – From Retiree Prospect to Client <i>Ryman PQR</i>
Introduction to Rebalance <i>Ryman ABC</i>	Branch Associate Development Opportunities <i>Ryman Ballroom</i>
Gain Insight Into Your Practice <i>Ryman DE</i>	
12 – 1 p.m.	Main Lunch <i>Ryman Hall C</i> Faith & Fellowship Lunch <i>Presidential AB</i>

BREAKOUT SESSIONS

1:15 – 2:15 p.m.	
RJFS & RJFSA Compliance <i>Delta B</i>	COB and the Master Advisory Agreement <i>Ryman DE</i>
Senior & At-Risk Clients <i>Governor's AE</i>	Create a World Class Prospect & Client Experience <i>Ryman MNO</i>
Variable & Structured Annuities <i>Governor's B</i>	Manage Custom Portfolios with Portfolio Management <i>Ryman PQR</i>
RJFS & RJFSA Supervision <i>Governor's CD</i>	Branch Associate Community: Panel Discussion <i>Ryman Ballroom</i>
Trade with Confidence in Consolidated Order Entry <i>Ryman ABC</i>	
1:15 – 4:35 p.m.	
Super CE *PREREGISTRATION REQUIRED* <i>Delta CD</i>	
2:25 – 3:25 p.m.	
Investment Advisory <i>Delta B</i>	Provide Personalized Service with RJ CRM <i>Ryman L</i>
RJFS & RJFSA Supervision <i>Governor's CD</i>	Cyberthreat Briefing: What You Need to Know <i>Ryman MNO</i>

■ Firm Element, Compliance, VA & Supervision Session

■ Technology Session

■ Branch Professional Session

Monday MAY 16

BREAKOUT SESSIONS

2:25 – 3:25 p.m. (cont.)	
Introduction to Rebalance <i>Ryman ABC</i>	GPM – Using for More Than Retirement <i>Ryman PQR</i>
Gain Insight Into Your Practice <i>Ryman DE</i>	Your Role in Team Dynamics <i>Ryman Ballroom</i>
3:35 – 4:35 p.m.	
RJFS & RJFSA Compliance <i>Delta B</i>	Create Customized Client Reports <i>Ryman DE</i>
Senior & At-Risk Clients <i>Governor's AE</i>	Streamline Your Desktop <i>Ryman L</i>
Variable & Structured Annuities <i>Governor's B</i>	FactSet Essentials & Key Workflows <i>Ryman MNO</i>
Generate High-Quality Proposals and Pitchbooks <i>Ryman ABC</i>	Stay Connected with Advisor Mobile <i>Ryman PQR</i>
The Art of WOW <i>Ryman Ballroom</i>	
5:30 – 6:30 p.m.	Fun Run <i>Starting Line at the Presidential Lobby/Portico</i>
6:30 – 9 p.m.	Welcome Event <i>Opryland Atrium</i>

■ Firm Element, Compliance, VA & Supervision Session

■ Technology Session

■ Branch Professional Session

Tuesday MAY 17

7 a.m. – 6 p.m.	Registration and Information Desk Open <i>Delta Lobby B</i>
7:15 – 8:15 a.m.	Breakfast <i>Ryman Hall C</i> FID Breakfast <i>Canal A-D</i> BP Tech Breakfast <i>Presidential DE</i>
8 a.m. – 4 p.m.	Spouse/Guest Lounge <i>Delta Island A-C</i>
8:30 – 10 a.m.	GENERAL SESSION: Paul Reilly Remarks & Town Hall – Paul Reilly, Scott Curtis, Jodi Perry, Tim Killgoar & Jeff Dobyns <i>Delta A</i>
10 a.m. – 4:30 p.m.	Technology Center and Internet Café <i>Presidential DE</i>
10:30 a.m. – 2 p.m.	Headshots <i>Presidential Ballroom Foyer</i>

BREAKOUT SESSIONS

10:15 – 11:15 a.m.	
The Power 50: Best of the Best Tips for Your Practice & Well-Being <i>Delta B</i>	Solutions for the \$25+ Million Client <i>Bayou AB</i>
The Indispensable Advisor <i>Delta C</i>	State of the Housing Market: Is it Different this Time? <i>Bayou CD</i>
Stories of Succession – Advisor Panel Discussion <i>Delta D</i>	Cryptocurrency 101 <i>Washington B</i>

■ Professional Development Session

Tuesday MAY 17

BREAKOUT SESSIONS

10:15 – 11:15 a.m. (cont.)	
“I Quit.” The Road to Retirement Begins with Individual Bonds <i>Governor’s AE</i>	Trade with Confidence in Consolidated Order Entry <i>Ryman ABC</i>
Inflation Regime Change and Capital Market Implications <i>Governor’s B</i>	Create Customized Client Reports <i>Ryman DE</i>
Providing the Necessary Insight for you to be Successful in Today’s Equity Markets <i>Governor’s CD</i>	Streamline Your Desktop <i>Ryman L</i>
Long-Term Investment Solutions for Advisory Clients <i>Presidential A</i>	Create a World Class Prospect & Client Experience <i>Ryman MNO</i>
Boost your Business, HR and Employee Benefits <i>Presidential B</i>	GPM – Using for More Than Retirement <i>Ryman PQR</i>
Advisor Fact Sheet: Know Your Facts <i>Presidential C</i>	Master Your Mindset – Push the Limits of Your Role and Elevate Your Game <i>Ryman Ballroom</i>
11:20 a.m. – 12:40 p.m.	Main Lunch <i>Ryman Hall C</i> Chairman’s Council Lunch <i>Lincoln C-E</i> Five Tips for Practice Optimization Lunch *BY INVITATION ONLY* <i>Canal A-D</i>

12:55 – 1:55 p.m.

GENERAL SESSION: KEYNOTE SPEAKER – Peter Diamandis | *Delta A*

BREAKOUT SESSIONS

2:10 – 2:55 p.m.

Ryan Poll <i>Delta B</i>	Introduction to Rebalance <i>Ryman ABC</i>
Lee Henderson <i>Delta C</i>	Gain Insight Into Your Practice <i>Ryman DE</i>
Russell Rabadeau, Lauren Bollinger, Eric Van Der Hyde & Chris Vidler <i>Governor’s AE</i>	Provide Personalized Service with RJ CRM <i>Ryman L</i>
Jeff Hausinger <i>Governor’s B</i>	Cyberthreat Briefing: What You Need to Know <i>Ryman MNO</i>
Capturing the High Net Worth Client – FID <i>Governor’s CD</i>	Manage Custom Portfolios with Portfolio Management <i>Ryman PQR</i>
Client Service & Engagement – Marketing Made Easy: Solutions to Grow Your Business & Simplify Your Life <i>Ryman Ballroom</i>	
3:05 – 3:50 p.m.	
Victor Adint & Matt Ross <i>Delta B</i>	My First Million – FID <i>Governor’s CD</i>
Jason DiLauro & Tyson Ray <i>Delta D</i>	

Technology Session ■ Branch Professional Session

Firm Element, Compliance, VA & Supervision Session

Professional Development Session ■ Top Advisor Session

Tuesday MAY 17

BREAKOUT SESSIONS

3:05 – 3:50 p.m. (cont.)	
Ryan Kelton, Sean Kelton & Dave Cole <i>Governor's AE</i>	COB and the Master Advisory Agreement <i>Ryman DE</i>
Jay Wheeler & Pamela Rigsby <i>Governor's B</i>	FactSet Essentials & Key Workflows <i>Ryman MNO</i>
Generate High-Quality Proposals and Pitchbooks <i>Ryman ABC</i>	Stay Connected with Advisor Mobile <i>Ryman PQR</i>
From Zoom to Room <i>Ryman Ballroom</i>	
4 – 5 p.m.	
Gain Control, Boost Morale, Grow Your Practice – Ready to Turn Chaos into Calm? <i>Delta B</i>	Recruitment & Hiring for Your Business <i>Presidential B</i>
Freedom: Navigating an Ever-Changing Global Investment Landscape <i>Delta C</i>	Attracting, Engaging and Serving the High and Ultra-High-Net-Worth Client Presented by Cannon Financial and Sponsored by Carillon Tower Advisers <i>Presidential C</i>
Succession & Acquisition Planning Update and How to Leverage Practice Exchange for Growth <i>Delta D</i>	Experience Cashville: An Insider's Guide <i>Bayou AB</i>

BREAKOUT SESSIONS

4 – 5 p.m. (cont.)	
Real-Time Solutions <i>Governor's AE</i>	Cash Flow Without Cashing Out: Cash Flow Planning in a Rising Interest Rate Environment <i>Bayou CD</i>
How Much is Enough? Answering This Question Will Change Your Life <i>Governor's B</i>	Agency: Lifestyle Benefits and Services for Your Clients <i>Washington B</i>
Real-Time Solutions for the Brokerage Advisor <i>Governor's CD</i>	Private Wealth Accelerated <i>Canal A-D</i>
Let's Work Together to Provide Protection and Planning Solutions for Your Clients <i>Presidential A</i>	FactSet Essentials & Key Workflows <i>Ryman MNO</i> Cyberthreat Briefing: What You Need to Know <i>Ryman PQR</i>
The Importance of Values <i>Ryman Ballroom</i>	
5 – 6 p.m.	Resource Center Reception <i>Ryman Hall C</i>
6:15 – 9 p.m.	FID Director's & Leaders Council Dinner *BY INVITATION ONLY* <i>Depart from Delta Portico</i>
6:30 – 9 p.m.	ICD Leaders Council Dinner *BY INVITATION ONLY* <i>Depart from Delta Portico</i>

- Technology Session
- Branch Professional Session
- Professional Development Session
- Top Advisor Session

Wednesday MAY 18

7 a.m. – 5 p.m.	Registration and Information Desk Open <i>Delta Lobby B</i>
7:45 – 9 a.m.	Breakfast Ryman Hall C CE Breakfasts (begin at 8) <i>Locations listed below.</i>
8 – 9 a.m. Buffet set outside of classroom for a working breakfast	
RJFS & RJFSA Compliance Breakfast Delta B	Senior & At-Risk Clients Breakfast Delta D
Investment Advisory Breakfast Delta C	RJFS & RJFSA Supervision Breakfast Presidential AB
8 a.m. – 4 p.m.	Spouse/Guest Lounge Delta Island A-C
9:15 – 10:15 a.m.	GENERAL SESSION: The Wall Street-Washington Connection – Larry Adam, Ed Mills & Jim Bunn Delta A
10:15 a.m. – 3:30 p.m.	Technology Center and Internet Café <i>Presidential DE</i>

BREAKOUT SESSIONS

10:25 – 11:25 a.m.	
Federated Hermes Delta B	Columbia Threadneedle Investments Bayou AB
J.P. Morgan Asset Management Delta C	Eagle Life Bayou CD

BREAKOUT SESSIONS

10:25 – 11:25 a.m. (cont.)	
AIG – Annuities Delta D	Eaton Vance Lincoln C-E
AllianceBernstein (AB) Presidential AB	F & G Annuities and Life Washington B
Allspring Governor’s AE	Generate High-Quality Proposals and Pitchbooks Ryman ABC
Lord Abbett Governor’s B	Create Customized Client Reports Ryman DE
BlackRock Governor’s CD	Streamline Your Desktop Ryman L
Brighthouse Financial Presidential C	Cyberthreat Briefing: What You Need to Know Ryman MNO
Calamos Investments Canal A-D	Stay Connected with Advisor Mobile Ryman PQR
Change for the Better: How to Master Change Management Ryman Ballroom	
11:30 a.m. – 1 p.m.	Main Lunch Ryman Hall C Women Financial Advisors Network Luncheon Ryman Ballroom

- Education & Marketing Partner Session
- Firm Element, Compliance, VA & Supervision Session
- Technology Session
- Branch Professional Session

Wednesday MAY 18

BREAKOUT SESSIONS

1:15 – 2:15 p.m.	
Fidelity Investments <i>Delta B</i>	Janus Henderson Investors <i>Bayou AB</i>
First Eagle Investments <i>Delta C</i>	John Hancock Investment Management <i>Bayou CD</i>
First Trust Portfolios <i>Delta D</i>	Lincoln Financial Distributors <i>Lincoln C-E</i>
Franklin Templeton <i>Presidential AB</i>	Introduction to Rebalance <i>Ryman ABC</i>
Global Atlantic Financial Group <i>Governor's AE</i>	COB and the Master Advisory Agreement <i>Ryman DE</i>
Goldman Sachs Asset Management <i>Governor's B</i>	Provide Personalized Service with RJ CRM <i>Ryman L</i>
Hartford Funds <i>Governor's CD</i>	FactSet Essentials & Key Workflows <i>Ryman MNO</i>
Invesco <i>Presidential C</i>	GPM – From Retiree Prospect to Client <i>Ryman PQR</i>
Jackson – Annuities <i>Canal A-D</i>	Operational Excellence: Client Servicing Efficiencies <i>Ryman Ballroom</i>
2:30 – 3:30 p.m.	
MFS Investment Management <i>Delta B</i>	T. Rowe Price <i>Bayou AB</i>
Nationwide <i>Delta C</i>	Thornburg Investment Management <i>Bayou CD</i>

BREAKOUT SESSIONS

2:30 – 3:30 p.m. (cont.)	
Natixis Investment Managers <i>Delta D</i>	Transamerica Funds <i>Lincoln C-E</i>
New York Life Investments/ Mainstay Funds <i>Presidential AB</i>	Virtus Investment Partners <i>Washington B</i>
Nuveen <i>Governor's AE</i>	Trade with Confidence in Consolidated Order Entry <i>Ryman ABC</i>
PGIM Investments <i>Governor's B</i>	Gain Insight Into Your Practice <i>Ryman DE</i>
PIMCO <i>Governor's CD</i>	FactSet Essentials & Key Workflows <i>Ryman MNO</i>
Principal Global Investors <i>Presidential C</i>	Create a World Class Prospect & Client Experience <i>Ryman L</i>
Putnam Investments <i>Canal A-D</i>	Manage Custom Portfolios with Portfolio Management <i>Ryman PQR</i>
Design Your Action Plan <i>Ryman Ballroom</i>	
3:45 – 5 p.m.	GENERAL SESSION: Creating a Positive Workplace Culture in Uncertain Times – Shola Richards <i>Delta A</i>
6 – 6:30 p.m.	Gala Reception <i>Delta Lobby</i>
6:30 – 8:30 p.m.	Gala Dinner <i>Delta A</i>
8:30 – 9:30 p.m.	Performance – Songwriter City <i>Delta A</i>
9:30 – 10:30 p.m.	Dance Party – Downtown Band <i>Delta A</i>

■ Education & Marketing Partner Session

■ Technology Session ■ Branch Professional Session