



DYNASTY FINANCIAL PARTNERS INVESTMENTS FORUM

MONDAY, NOVEMBER 8

TIME	SESSION	LOCATION
11:00 AM - 2:00 PM	Investments Forum Registration <i>Sponsored by BlackRock</i>	Hutton Lobby
2:00 PM - 2:15 PM	Investments Forum Welcome Joe D'Agostino Head of Investment Platform and Product Strategy, Dynasty Financial Partners	Vista Ballroom
2:15 PM - 2:45 PM	State of Dynasty Financial Partners Shirl Penney President & CEO, Dynasty Financial Partners	Vista Ballroom
2:45 PM - 3:15 PM	Dynasty Tech Overview Ed Swenson Chief Operating Officer, Dynasty Financial Partners, President, ASx Frank Coates Chief Technology Officer, Dynasty Financial Partners Taylor Howard Chief Digital Officer, Dynasty Financial Partners	Vista Ballroom
3:15 PM - 3:45 PM	Conversation with Alexis Ohanian Alexis Ohanian Founder, Seven Seven Six & Former Executive Chair, Reddit Moderator: Ed Swenson Chief Operating Officer, Dynasty Financial Partners	Vista Ballroom
3:45 PM - 3:55 PM	BREAK	Ballroom Foyer
3:55 PM - 4:45 PM	Managing Diverse Portfolios for Diverse Investors Amanda Baker Khan Client Relationship Manager, Ethic Michelle Gadsden-Williams Global Head of DE&I, BlackRock Yasmin Landy Institutional Portfolio Manager, Fidelity Investments Moderator: Angela Gingras Managing Director, Operations Dynasty Financial Partners	Vista Ballroom
4:45 PM - 4:50 PM	iCapital Network Overview	Vista Ballroom
4:50 PM - 5:35 PM	Day 1 Fireside Keynote with Jeb Bush Jeb Bush Former Governor of Florida <i>Sponsored by iCapital Network</i> Interviewed by: Joe D'Agostino Head of Investment Platform and Product Strategy, Dynasty Financial Partners	Vista Ballroom
5:35 PM - 5:40 PM	Day 1 Closing Joe D'Agostino Head of Investment Platform and Product Strategy, Dynasty Financial Partners	Vista Ballroom
5:40 PM - 7:30 PM	Born to Perform Cocktail Reception <i>Sponsored by Natixis</i>	Hotel Restaurant Space, Lobby Level
7:30 PM - 10:00 PM	Offsite Dinners	Nashville Restaurants

TUESDAY, NOVEMBER 9

TIME	SESSION	LOCATION
7:30 AM - 8:30 AM	Breakfast <i>Sponsored by First Trust</i>	Hillsboro Ballroom
7:30 AM - 8:30 AM	Born to Lead CEO Breakfast with Avery Johnson (Invite Only) Hosted by: Shirl Penney President & CEO, Dynasty Financial Partners	Hotel Restaurant Space, Lobby Level
8:30 AM - 8:35 AM	Day 2 Welcome Marcus Wilson SVP, Investment Platforms Management, Dynasty Financial Partners	Vista Ballroom
8:35 AM - 9:20 AM	Entrepreneurs Building Transformative Companies Steve Case Chairman and CEO, Revolution; Founder and Partner, Revolution Growth; Co-Founder, America Online; Chairman, Case Foundation	Vista Ballroom
9:20 AM - 10:05 AM	Assessing the State of Equity Markets at Home and Abroad Peter Bourbeau Managing Director, ClearBridge Dan Davidowitz Lead Portfolio Manager, Focus Growth, Polen Capital Simon Hallett CO-CIO, Harding Loevner Moderator: Nick Gerace Senior Vice President, Investments, Dynasty Financial Partners	Vista Ballroom
10:05 AM - 10:50 AM	Navigating Credit Markets in a Challenging Rate Environment Matt Buscone Executive Vice President Co-Head of Portfolio Management, Breckinridge Steve Kuppenheimer Senior Managing Director Blackstone Credit David Leduc, CFA Deputy CEO, North America Insight Investment Randy Schwimmer Co-Head of Senior Lending, Churchill Moderator: Nick Gerace Senior Vice President, Investments, Dynasty Financial Partners	Vista Ballroom
10:50 AM - 11:00 AM	Break	Ballroom Foyer
11:00 AM - 11:50 AM	Dynasty Network Advisors Share Their Views on Portfolio Construction Sarah Damsgaard Co-Founder, Managing Partner, Invictus Collective Mike Durso Founding Partner, Chief Investment Officer, Shorehaven Wealth Partners Matt Kilgroe President & CEO, Cyndeo Wealth Partners Antonio Rodrigues Partner, Senior Portfolio Manager, Procyon Procyon Partners Moderator: Jeremy Zoladz Director, Relationship Management, Dynasty Financial Partners	Vista Ballroom
11:50 AM - 12:30 PM	Inflationary Concerns and the Impact on Real Assets Chase Bolding CIO and Portfolio Manager, Invesco Real Estate Team Eric Kaplan President, Griffin Capital Private Equity Jim Murchie President, CEO and Co-Portfolio Manager, Energy Income Partners, LLC Moderator: Nick Gerace Senior Vice President, Investments, Dynasty Financial Partners	Vista Ballroom
12:30 PM - 1:20 PM	Lunch	Hillsboro Ballroom

TUESDAY, NOVEMBER 9 (CONTINUED)

TIME	SESSION	LOCATION
1:20 PM - 2:05 PM	<p>Uncovering Investment Opportunities Around the Globe</p> <p>Howard Marks Co-Chairman, Oaktree Capital</p>	<p>Interviewed by: Anastasia Amoroso Chief Investment Strategist, iCapital Network</p> <p>Vista Ballroom</p>
2:05 PM - 2:40 PM	<p>Macro Economics Virtual Fireside Chat</p> <p>Liz Ann Sonders Chief Investment Strategist, Charles Schwab</p>	<p>Interviewed by: Joe D'Agostino Head of Investment Platform and Product Strategy, Dynasty Financial Partners</p> <p>Vista Ballroom</p>
2:40 PM - 3:25 PM	<p>Protecting Portfolios and Diversifying from Traditional Asset Classes</p> <p>Jason Barsema Co-Founder & President, Halo Investing</p> <p>Hamilton Reiner Head of the U.S. Structured Equity Team, Head of U.S. Equity Derivatives, Portfolio Manager, J.P. Morgan Equity Asset Management</p>	<p>Chris King Founder & CEO, Eaglebrook</p> <p>Moderator: Nick Gerace Senior Vice President, Investments, Dynasty Financial Partners</p> <p>Vista Ballroom</p>
3:25 PM - 3:40 PM	Break	Ballroom Foyer
3:40 PM - 4:40 PM	<p>Keynote with Daymond John</p> <p>Daymond John Top Business and Motivational Speaker, founder and CEO of FUBU Clothing, Shark Tank Reality TV Judge, and Bestselling Author</p>	Vista Ballroom
4:40 PM - 5:25 PM	<p>A Conversation Unlike Any Other with Jim Nantz</p> <p>Jim Nantz CBS Sports Commentator</p>	<p>Hosted by: Michelle Smith Chief Executive Officer, Source Financial Advisors</p> <p>Vista Ballroom</p>
5:25 PM - 5:30 PM	<p>Day 2 Closing</p> <p>Joe D'Agostino Head of Investment Platform and Product Strategy, Dynasty Financial Partners</p>	Vista Ballroom
5:30 PM - 6:15 PM	Break	On Own
6:15 PM - 6:30 PM	Transfer to Martin's BBQ Joint	Hutton Hotel Lobby
6:30 PM - 8:30 PM	Offsite Dinner Experience at Martin's BBQ Joint	<p>Martin's BBQ Joint 410 4th Avenue South Nashville, TN 37201</p>
8:30 PM - 9:00 PM	Transfer to Analog Theater at the Hutton Hotel	Transfer
9:00 PM - 11:30 PM	Dynasty Unplugged - Evening Experience with Clint Black	Analog Theater

WEDNESDAY, NOVEMBER 10

TIME	SESSION	LOCATION
8:00 AM - 9:00 AM	Breakfast	Hillsboro Ballroom
8:00 AM - 9:00 AM	Dynasty Women's Network Breakfast with Cathie Wood (Invite Only) Hosted by: Angela Gingras Managing Director, Operations, Dynasty Financial Partners	Hotel Restaurant Space, Lobby Level
9:00 AM - 9:05 AM	Day 3 Welcome Joe D'Agostino Head of Investment Platform and Product Strategy, Dynasty Financial Partners	Vista Ballroom
9:05 AM - 10:00 AM	Disruptive Innovation: A Conversation with Cathie Wood and Josh Brown Cathie Wood Chief Executive Officer & Chief Investment Officer, ARK Investment Management LLC Interviewed by: Josh Brown Host of CNBC's "Fast Money Halftime Report" & CEO, Ritholtz Wealth Management	Vista Ballroom
10:00 AM - 10:10 AM	Investments Forum Closing Joe D'Agostino Head of Investment Platform and Product Strategy, Dynasty Financial Partners	Vista Ballroom
10:30 AM	Departures	Hutton Hotel Lobby

