



February 5 – 8, 2023 | Fontainebleau Hotel Miami Beach

PRE-CONFERENCE SESSIONS

Sunday, February 5th

9:00am	Conference Registration Open!
1:00pm – 5:00pm	See content tracks below
6:00pm	Opening reception

For financial advisors: Flicker ballroom (4th floor)

1:00pm – 2:40pm	Modern Advisor Ethics <i>This session is worth 2 CE credits.</i> Speaker: Rita Cheng
2:40pm – 3:00pm	Coffee Break
3:00pm – 3:20pm	ETF University: Tools For Advisors <i>This is part of the ETF University block of sessions worth 2 CE credits.</i> Speakers: Todd Rosenbluth, Lara Crigger
3:20pm – 3:50pm	ETF University: Sorting Through a Growing ETF Universe <i>This is part of the ETF University block of sessions worth 2 CE credits.</i> Speakers: Eric Balchunas, Elisabeth Kashner, Aniket Ullal
3:50pm – 4:05pm	ETF University: Due Diligence Session <i>This is part of the ETF University block of sessions worth 2 CE credits.</i> Speakers: Nate Geraci, Eric Balchunas, Elisabeth Kashner, Aniket Ullal
4:05pm – 4:20pm	ETF University: What to Expect When Trading ETFs <i>This is part of the ETF University block of sessions worth 2 CE credits.</i> Speakers: Ugo Egbunike
4:20pm – 4:40pm	ETF University: How to Build an ETF Portfolio <i>This is part of the ETF University block of sessions worth 2 CE credits.</i> Speakers: Cinthia Murphy, John Davi, Shana Orczyk Sissel, Lisa Kirschner
4:40pm	Break



For industry and media attendees: Splash 9-12

1:00pm – 2:00pm	The Future of Distribution Speakers: Tom Hendrickson, Jon Fee
2:00pm – 3:00pm	Meet the Press Moderator: Bob Pisani Panelists: Chris Sullivan, Kathie O'Donnell, Tania Mitra, Karishma Vanjani, Lara Crigger, Chris Sullivan
3:00pm – 3:45pm	Break – Meet the Press
3:45pm – 4:15pm	ETF Infrastructure: Mastering the ETF Ecosystem Speakers: Michael Prendergast, Nichole Kramer, Ben Johnson
4:15pm – 5:00pm	ETF Regulation: The New Normal Speakers: Deborah Fuhr, Jeremy Senderowicz, Steve Fineour, Ed Baer
5:00pm	Break
6:00pm	Opening Night Reception

DAY ONE

Monday, February 6th

6:30am – 7:30am	Sunrise Yoga on the Beach
7:00am – 8:00am	Surfrider Beach Clean-up
7:00am – 9:00am	Community Breakfast
7:00am – 8:30am	Women in ETFs Breakfast
9:00am – 9:20am	Welcome to Exchange
9:20am – 10:20am	Geopolitical Recession <i>This session is worth 1 CE credit.</i> Speakers: Ian Bremmer
10:20am – 10:30am	Tribute to ETF Pioneer Kathleen Moriarty Speakers: Deborah Fuhr, Sue Thompson, Jim Ross
10:35am - 11:00am	Coffee Break

Track 1: The Next Gen Practice – Dream stage in Sparkle ballroom

11:00am – 11:30am	Investor Sentiment – Past & Future <i>This session is worth 1 CE credit.</i> Speakers: Caleb Silver, Jeff DesJardins
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- 11:30am – 11:50am **Tickers, Themes, and Trends, Oh My! Top Research Insights In 2023**
Speaker: Lara Crigger
- 11:50am – 12:15pm **Why Your Clients Are Asking About Direct Indexing?**
Speakers: Randy Bullard, Ben Hammer, Peter Dietrich
- 12:15pm – 12:40pm **Active Strategies: The Pendulum Has Swung**
Speakers: Holly Framsted, Tim Coyne, Doug Yones

Track 2: The Future of Finance – Stream stage in Glimmer ballroom

- Welcome Remarks: Kristof Gleich**
Speaker: Kristof Gleich
- 11:00am – 12:40pm **The Future of Finance**
This session is worth 2 CE credits.
Speakers: Dave Nadig, Tom Morgan, Adam Butler, Mike Green, Danielle DiMartino, Georgia Stewart, Jim Bianco
- 12:40pm – 1:40pm **Lunch**

Combined sessions

- 1:40pm – 2:00pm **Tackling Inflation Within Client Portfolios**
Speaker: Bill Pauley, Balaji Venkataraman, Cinthia Murphy
- 2:00pm – 2:20pm **Future of Index Innovation**
Speakers: Ben Johnson, Craig Lazzara, Sebastien Lieblich
- 2:20pm – 2:40pm **Unpacking Emerging Markets Opportunities**
Speakers: Brendan Ahern, Jan van Eck
- 2:40pm – 3:00pm **SPY 30 – Celebrating the 1st ETF and America’s Love For Innovation**
Speakers: Hilary Corman Kirsch, Colin Ireland, Tim Urbanowicz, Scott Chronert.
- 3:00pm – 3:50pm **2023 Outlook with J.P. Morgan’s Dr. David Kelly**
This session is worth 1 CE credit.
Speaker: Dr. David Kelly
- 3:50pm – 4:10pm **End of Day Wrap Up**
- 4:10pm **Community Time**
- 8:00pm **Pub Quiz**



DAY TWO

Tuesday, February 7th

6:30am – 7:30am	Sunrise Yoga on the Beach
6:30am – 8:30am	Susan G. Komen More Than PINK Walk
7:00am – 9:00am	Community Breakfast

Track 1: Build Better Portfolios – Dream stage in Sparkle ballroom

9:00am – 9:30am	TINA No More – Equity Markets in the New Normal Speakers: Ben Lavine, Cam Dawson, Katie Stockton, Liz Young
9:30am – 10:00am	Thematics – Separating Hype from Opportunity Speakers: Roxanna Islam, Laura Morrison, Ryan O. Issakainen
10:40am – 11:10am	Coffee Break
10:00am – 10:40am	Fixed Income – Modern Perspectives Speakers: Jim Bianco, Jeff Sherman, Steve Laipply
11:10am – 11:40pm	Build Better Portfolios: Liquid Alternatives - A Decade Later But Any Different? Speakers: Corey Hoffstein, Andrew Beer, Doug Fincher
11:40am – 12:05pm	Build Better Portfolios: American Energy at a Crossroads Speakers: Stacey Morris, Sam Rines
12:05pm – 12:30pm	Build Better Portfolios: The Changing Role of Bonds Speakers: Mike Arone, David Braun, Todd Rosenbluth

Track 2: Be a Better Advisor – Stream stage in Glimmer ballroom

9:00am – 9:50am	Advanced Financial Planning – Real-World Strategies Speaker: Vance Barse
9:50am – 10:20am	Storytelling for Advisors <i>This session is worth 1 CE credit.</i> Speaker: Brian Portnoy
10:20am – 10:40am	Your Financial Psychology Playbook Speaker: Dr. Preston Cherry
10:40am – 11:10am	Coffee Break
11:10am – 12:00pm	Be a Better Advisor: AdvisorTech Expo – Breaking the Mold Speakers: Michael Batnick
12:00pm – 12:10pm	Be a Better Advisor: TikTok For Warren Buffet? How To Educate Across the Generations Speakers: Kyla Scanlon



12:10pm – 12:30pm **Be a Better Advisor: Level Up Your Content Marketing - 20 Ideas in 20 Minutes**
Speakers: Lara Crigger, Samantha Russell

Combined sessions

12:30pm – 2:30pm **Community Lunch and Networking Time**

2:30pm – 3:00pm **Global Leadership Trends in Asset Management Today**
Speakers: Anthony Rochte, Lenore Reiner, John Streur

3:00pm – 4:00pm **Masters in Business Live With Vanguard's Tim Buckley**
Speakers: Barry Ritholtz, Tim Buckley

4:00pm – 4:30pm **Pioneering Innovation: A Conversation on Leadership Across Business and Sport**
Speakers: Anna Paglia, Oliver Albers, Roy Williams

4:30pm – 5:00pm **Keynote: Resilience with Rodney Mullen**
Speakers: Rodney Mullen, Dave Nadig

5:00pm – 5:15pm **Closing Remarks**

6:00pm – 8:00pm **Closing Reception**

DAY THREE

Wednesday, February 8th

6:30am **Sunrise Yoga on the Beach**

8:30am – 11:00am **Financial Foundations with Junior Achievement of Greater Miami**

11:00am **Conference conclusion**