February 5 – 8, 2023 | Fontainebleau Hotel Miami Beach

**PRE-CONFERENCE SESSIONS**

**Sunday, February 5th**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>9:00am</td>
<td>Conference Registration Open!</td>
</tr>
<tr>
<td>1:00pm – 5:00pm</td>
<td>See content tracks below</td>
</tr>
<tr>
<td>6:00pm</td>
<td>Opening reception</td>
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For financial advisors: Flicker ballroom (4th floor)

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

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
  *This session is worth 1 CE credit.*
  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
  *This session is worth 1 CE credit.*
  Speakers: Caleb Silver, Jeff DesJardins
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**

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
10:00am – 10:40am  Fixed Income – Modern Perspectives
  Speakers: Jim Bianco, Jeff Sherman, Steve Laipply
11:00am – 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
  This session is worth 1 CE credit.
  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

Visit ExchangeETF.com for more information.
### Day Two

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<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Speakers</th>
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<tbody>
<tr>
<td>12:10pm – 12:30pm</td>
<td><strong>Be a Better Advisor: Level Up Your Content Marketing - 20 Ideas in 20 Minutes</strong></td>
<td><strong>Speakers:</strong> Lara Crigger, Samantha Russell</td>
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**Combined sessions**

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<tr>
<td>12:30pm – 2:30pm</td>
<td><strong>Community Lunch and Networking Time</strong></td>
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<tr>
<td>2:30pm – 3:00pm</td>
<td><strong>Global Leadership Trends in Asset Management Today</strong></td>
<td><strong>Speakers:</strong> Anthony Rochte, Lenore Reiner, John Streur</td>
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<tr>
<td>3:00pm – 4:00pm</td>
<td><strong>Masters in Business Live With Vanguard’s Tim Buckley</strong></td>
<td><strong>Speakers:</strong> Barry Ritholtz, Tim Buckley</td>
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<tr>
<td>4:00pm – 4:30pm</td>
<td><strong>Pioneering Innovation: A Conversation on Leadership Across Business and Sport</strong></td>
<td><strong>Speakers:</strong> Anna Paglia, Oliver Albers, Roy Williams</td>
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<tr>
<td>4:30pm – 5:00pm</td>
<td><strong>Keynote: Resilience with Rodney Mullen</strong></td>
<td><strong>Speakers:</strong> Rodney Mullen, Dave Nadig</td>
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<tr>
<td>5:00pm – 5:15pm</td>
<td><strong>Closing Remarks</strong></td>
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<tr>
<td>6:00pm – 8:00pm</td>
<td><strong>Closing Reception</strong></td>
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### Day Three

**Wednesday, February 8th**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>6:30am</td>
<td><strong>Sunrise Yoga on the Beach</strong></td>
</tr>
<tr>
<td>8:30am – 11:00am</td>
<td><strong>Financial Foundations with Junior Achievement of Greater Miami</strong></td>
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<tr>
<td>11:00am</td>
<td><strong>Conference conclusion</strong></td>
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