

# THE PURSUIT OF PURPOSE <sup>20</sup><sub>26</sub>

SPRING FINANCIAL ADVISER CONFERENCE

VIRTUAL CONFERENCE AGENDA

APRIL 23

8:00 - 9:00

**Introduction & Information from Our Sponsors**

9:00 - 9:45

**Faith-Based Investing by Creative Financial Designs**

With Kregg Rooze

9:45 - 10:00

**Turning Your Network into a Revenue Stream**

With Jamie Barber

10:00 - 11:00

**Building a Practice**

With Greg Smith

11:00 - 11:15

**Social Media Compliance Questions Answered**

With Kelly Stockberger

11:15 - 12:00

**Embracing Growth with Virtual Assistants**

Featuring Nathan Cruz, Kyle Marburger, and Saeed Sulaiman

12:00 - 1:00

**Lunch Break & Word from Our Corporate Sponsors**

1:00 - 1:30

**They Took a Chance on Me: A Successor's Journey**

With Caleb Clark

1:30 - 2:15

**The Digital Tightrope: Balancing Tech Innovation & Compliance**

With The Compliance Team

2:15 - 2:45

**E-Money vs. Right Capital**

With Kiersten Tate

2:45 - 3:00

**Sycamore Best Practices**

With Makayla Hubartt

3:00 - 3:45

**Economic Outlook**

With Ryan Wright, CFA

3:45 - 5:00

**Building Legacy by Design: Adviser Roundtable**

Featuring Al Chandler, Rich D'Ambola, Mick Owens,  
Peter Passalacqua, Daryl Phillips, and Jill Woods

(All times are in EST)