



AGENDA OUTLOOK 2024 | October 28-29

Sunday, October 27

4:00 – 6:00 PM Board Meeting
8:00 PM Meet in Hotel Lounge - for a nightcap and your first drink is on NAAIM!

Monday, October 28

7:30 AM **Registration** – Breakfast in the Sponsor Hall
8:30 AM Welcome – Barry Arnold, NAAIM President
8:45 AM **Technical Analysis – You Make Markets Fun and The Message in the Charts** - John Roque, Sr. Managing Director, Head of Technical Strategy, 22V Research
9:45 AM **The Role of AI in Wealth & Investment Management** - Ben Olsen, Founder and CEO, Beemo Automation
10:45 AM Refreshment Break
11:00 AM **The Equity Rotation Challenge & Where Does Crypto Fit?** - Simeon Hyman, CFA, Global Financial Strategist, ProShares
12:00 PM Lunch - Sponsor Introductions
1:00 PM **Financial Planning: The Good, the Bad, and the Ugly** – Paul Culbreth, Culbreth Wealth Management; Branden DuCharme, DuCharme Wealth Management; and Laura Redfern, Shadowridge Asset Management, LLC.
2:00 PM **Constructing and Back Testing Multi-Strategy Portfolios** - Marsten Parker, Founder, RealTest (Monitoring System Performance)
3:00 PM Refreshment Break
3:30 PM **Is My Strategy Broken? Telltale signs that something is wrong** – David Bush, ALPHATATIVE LLC; John McClure, ProfitScore Capital Management, Inc.; and Marsten Parker, RealTest – Systematic Solutions, LLC.
4:30 – 5:45 PM **NAAIM Member Round Tables:** Informal concurrent discussions
Session #1 Topics and Moderators:

- Marketing: Jacob Deschenes, Era Capital Management
- Research and Back Testing Software: Rob Hanna, Capital Advisors 360 and Marsten Parker, RealTest
- AI in Your Practice: Jim Bernstein, QEX Asset Management

Session #2 Topics and Moderators

- Marketing: Rich Davila, ProfitScore Capital Management, Inc.

- Crypto: Jim Lee, StratFI
 - Custodians: Barry Arnold, Globalview Capital Management
- 6:15 – 9:00 PM **NAAIM Evening Event – Truck Yard at the Colony**

Tuesday, October 29

- 7:30 AM Breakfast in the Sponsor Hall
- 8:30 AM **2024 Election and Policy Outlook - Shahira Knight**, Managing Principal, Policy & Government Relations, Deloitte
- 9:30 AM **Shhh...The "Not-So-Secret" Secret to Success in Business** - Dallas Amsden, Speaker and Executive Communication Trainer, Communicate2Succeed.com
- 10:30 Refreshment Break
- 11:00 AM **The Long and Short of Volatility-Based Trading** - Vance Harwood, President, Six Figure Investing (VIX)
- 12:00 PM Lunch – Roundtable Summaries
- 1:00 PM **Marketing – NAAIM Member Panel**
- 2:00 PM **Examination Evolution - A Fresh Look at SEC Exam Trends and Insights** - Stephen Galletto, Esq., and Joe Antonakakis, Esq., Stark & Stark Attorneys at Law
- 3:00 PM Refreshment Break
- 3:15 PM **Does My New Strategy Have Legs? Metrics, ratios and analysis to determine if you have something special – NAAIM Member Panel:** Barry Arnold, Global View Capital Management; Josh Kneller, Atlas Capital Management; Dave Morton, Global View Capital Management and Jeff Pietsch, Capital Advisors 360, LLC.
- 4:00 PM Conference Adjourns