

Agenda

Wednesday, May 3rd

8:00 – 10:00	Registration Open	Promenade Foyer
10:00 – 2:00	Mimosa Brunch Cruise on The Venetian Lady, touring beautiful Miami Beach, while networking with TradePMR staff and fellow advisors.	Eden Roc Marina
2:00 – 6:00	Registration Open	Promenade Foyer
3:00 – 5:00	CPE Class- How to Grow Your Practice with CPA's Troy Patton	Key Biscayne
6:00 - 7:00	Ocean Garden Welcome Reception – Join us for the Hot Ocean Garden Havana Nights Party with hand-rolled, premium cigars! Meet with other advisors, sponsors and TradePMR staff and make plans to continue your conversation over dinner.	

Thursday, May 4th

8:00 – 9:00	Networking Breakfast	Ocean BR Salon 2A
9:00 – 9:30	CEO Welcome – Powered by You Robb Baldwin, CEO, TradePMR	Pompeii Ballroom
9:30 – 10:15	The Power of EarnWise Rob Dilbone, Managing Director, TradePMR	Pompeii Ballroom
10:15 – 10:45	Networking Break	Promenade
10:45 – 10:50	TED Talk – Using Current Life Insurance to Pay for Senior Care: Don Poole	Pompeii Ballroom
10:50 – 11:50	The Power of the Network - Bill Coppel, Chief Client Growth Officer, First Clearing	Pompeii Ballroom
11:50 – 11:55	TED Talk – Investing in a Rising Interest Rate Environment: Mike Terwilliger	Pompeii Ballroom

12:00 – 1:30	Succession Planning Lunch	Ocean BR Salon 2A
1:30 – 2:15	Sponsor Breakout Session 1 1. LifeCare Funding - Using Life Insurance to pay for Long Term Care and Senior Living 2. JVB Financial - Fixed Income: Navigating a Changing Landscape 3. PPCLoan - Transitions, Acquisitions, & Successions: A Roadmap for Financing 4. Ascendant	Key Biscayne B Key Biscayne A Palm Star
2:15 – 2:30	Break	Breakout Foyer
2:30 – 3:15	Sponsor Breakout Session 2 1. LifeCare Funding - Using Life Insurance to pay for Long Term Care and Senior Living 2. First Trust Portfolios The Niche Factor: Specialize for Success 3. SumRidge 4. Advisor Engine	Key Biscayne B Key Biscayne A Palm Star
3:15 – 3:25	Break	Breakout Foyer
3:25 – 3:50	EarnWise: Advisor Workstation Carolyn Victoria, TradePMR	Pompeii Ballroom
3:50 – 4:15	EarnWise: Robo Solution and Client Portal Beth Pinchot, TradePMR	Pompeii Ballroom
4:15 – 4:30	Break	Promenade
4:30 – 4:35	TED Talk – Think and Grow AUM - Joseph Childrey	Pompeii Ballroom
4:35 – 6:05	Keynote Speaker – Mike Rayburn – “What if...?” World-class guitarist and stand-up comedian, he will teach you to access your unrealized potential to look at old things in a new way to leap beyond your perceived limitations.	Pompeii Ballroom
6:05 – 7:05	Networking Reception	Promenade

Friday, May 5th

8:00 – 9:00	Networking Breakfast	Ocean BR – Salon 2A
9:00 – 9:25	TradePMR Breakout session: 1. The Fiduciary Rule: A Policy Perspective Christine Young 2. EarnWise: Advanced Carolyn Victoria & Mikie de Graaf 3. Recruiting IARs Frederick Van Den Abbeel	La Gorce Palm Star
9:25 – 9:40	Break	
9:40 – 10:05	TradePMR Breakout session: 1. Anti-Money Laundering Jeff Halvosa 2. EarnWise: Advanced Carolyn Victoria & Mikie de Graaf 3. Recruiting IARs Frederick Van Den Abbeel	La Gorce Palm Star
10:05 – 10:20	Break	
10:20 – 10:45	TradePMR Breakout session: 1. The Fiduciary Rule: A Policy Perspective Christine Young 2. EarnWise: Robo Solution and Client Portal Beth Pinchot 3. Seize Opportunity Anywhere: Trading with EarnWise -Scott Victoria	La Gorce Palm Star
General Session:		
11:00 – 11:45	Advisor Panel Discussion	Pompeii Ballroom
11:45- 12:00	Powered by You Concluding Discussion Robb Baldwin and staff	Pompeii Ballroom