

2017 Innovation Xchange Agenda

MONDAY, OCTOBER 2, 2017

10:00am – 4:00pm	Pre-Conference Event: Golf Tournament – Tee off from one of three championship golf courses at the Omni. The layout meanders throughout serpentine salt marshes and beneath the moss-draped oaks. <i>Co-Sponsored by: FolioDynamix, Dana Investment Advisors, RNC Genter, Todd Asset Management, Horizon Investments</i>	Omni Oak Marsh Course Located on the west side of the property on Sea March Road - a short shuttle ride from the hotel.
10:00am – 4:00pm	Pre-Conference Event: Sailing Regatta – Join other attendees on a four-hour sail. The Captains set up a course and have assignments for the guests to perform while learning a few sailing tips.	Depart from the Omni Lobby Transportation provided.
6:00pm – 10:00pm	Welcome to Amelia Island: Opening Reception – Experience the native culture and cuisine offered by the island and relax around a fire on the beach. Casual beach attire suggested. <i>Co-Sponsored by: FolioDynamix, Federated Securities, RNC Genter, Clark Capital Management Group</i>	Oceanside Beach Located at the end of the pool deck.
10:00pm -	After Hours Hospitality – Join us for an after-hours reception hosted by FolioDynamix	Presidential Cottage Adjacent to the Ballroom on Green Winged Teal Road – walking distance

TUESDAY, OCTOBER 3, 2017

8:00am – 9:00am	Networking Breakfast and Registration	8 Flags Patio and Lawn
9:00am – 10:30am	FolioDynamix and Investnet: Defining the future of wealth management	Amelia Ballroom 3, 4
10:30am – 10:45am	Networking Break: Meet Our Sponsors – Collect points for a chance to win custom fit Maui Jim sunglasses at the conclusion of the conference! Must be present to win.	Amelia Foyer
10:45am – 11:45am	Keynote Speaker: Define the Next 10 Years – <i>Greg Valliere, Horizon Investments</i>	Amelia Ballroom 3, 4
11:45am – 12:30pm	Networking Lunch <i>Co-Sponsored by: FolioDynamix and Nasdaq</i>	8 Flags Patio and Lawn
12:30pm – 1:00pm	Networking Break: Meet Our Sponsors – Collect points for a chance to win custom fit Maui Jim sunglasses at the conclusion of the conference! Must be present to win.	Amelia Foyer
1:00pm – 1:45pm	Topic: Is there a Future for Active Management? <i>Shari Hensrud, President, FDX Advisors & CIO</i>	Amelia Ballroom 3, 4
1:45pm – 1:55pm	Transition Break	
1:55pm – 2:40pm	Investment Workshop: Embracing Disruption – an Investor’s Perspective <i>Presented by: Dana Investment Advisors</i>	Amelia Ballroom 1
	Technology Workshop: The Future of Digital Advice <i>Presented by: Dan Ciavarella, EVP, Head of Product Strategy and Marketing, FolioDynamix</i>	Amelia Ballroom 2
2:40pm – 2:50pm	Transition Break	
2:50pm – 3:35pm	Investment Workshop: Investing for the future <i>Presented by: Federated Securities</i>	Amelia Ballroom 1
	Technology Workshop: Enterprise Tech Stack <i>Presented by: Sooryen and Mark Davis, CTO, FolioDynamix</i>	Amelia Ballroom 2

3:35pm – 4:00pm	Networking Break – Grab a drink and a snack. Don't forget to meet with all of our sponsors and collect points for a chance to win custom fit Maui Jim sunglasses at the conclusion of the conference! <i>Sponsored by: OBS Financial</i>	8 Flags Patio and Lawn
4:00pm – 4:45pm	Day 1 Wrap Up – <i>Dan Ciavarella, EVP, Head of Product Strategy and Marketing, FolioDynamix</i> Toast to 10 years – <i>Joe Mrak, Chairman & CEO, FolioDynamix</i>	Amelia Ballroom 3, 4
4:45pm – 5:45pm	Cocktail Reception: Meet Our Sponsors – Collect points for a chance to win custom fit Maui Jim sunglasses at the conclusion of the conference! Must be present to win. <i>Co-Sponsored by: FolioDynamix and SouthernSun</i>	Amelia Foyer
6:00pm – 10:00pm	Networking Reception – <i>Savor island cuisine inspired by the region's culture and ingredients, enjoy a sunset view from the deck, experience fun and unique opportunities.</i> <i>Co-Sponsored by: FolioDynamix, Dana Investment Advisors, Horizon Investments, Alger</i>	Walker's Landing Depart from the Omni Lobby, transportation provided.
10:00pm -	After Hours Hospitality – Join us for an after-hours reception hosted by FolioDynamix	Presidential Cottage Adjacent to the Ballroom on Green Winged Teal Road – walking distance

WEDNESDAY, OCTOBER 4, 2017

8:00am – 9:00am	Networking Breakfast	8 Flags Patio and Lawn
9:00am – 10:00am	Keynote Speaker: Showtime. Preparing for the Spotlight: When it's time to tell your story to prospective clients. <i>Gary DeMoss, Invesco</i>	Amelia Ballroom 3, 4
10:00am – 10:15am	Networking Break: Meet Our Sponsors – Last chance to collect points for a chance to win custom fit Maui Jim sunglasses at the conclusion of the conference! Must be present to win.	Amelia Foyer
10:15am – 11:00am	Investment Workshop: Selling Investment Process and Philosophy <i>Presented by: RNC Genter</i>	Amelia Ballroom 1
	Technology Workshop: Selling Advisory <i>Presented by: RiskPro</i>	Amelia Ballroom 2
11:00am – 11:10am	Transition Break	
11:10am – 12:30pm	Keynote Speaker: What's next for the world: the advances and stumbling blocks that will emerge in the next 10 years, and how we can navigate them – <i>Alec Ross, New York Times Best-Selling Author & Former Senior Advisor for Technology and Innovation at the State Department.</i>	Amelia Ballrooms 3, 4
12:30pm – 1:00pm	Conclusion of conference and game winners announced (must be present to win) – <i>Dan Ciavarella, EVP, Head of Product Strategy and Marketing</i>	Amelia Ballrooms 3, 4
1:00pm	Lunch – Grab and Go Book signing opportunity with Alec Ross	8 Flags Patio and Lawn

Power stations provided by: *Todd Asset management*

Lanyards provided by: *Alta Capital Management*

Wi-Fi sponsor: *Sooryen*