November 16-19, 2020
Virtual

2020 NATIONAL USER CONFERENCE AGENDA

Monday, November 16th	
2:00pm - 2:50pm	**General Session** – **"Accutech's State of the Union"** *Presented by Adam Unger, President, Accutech Systems*
3:00pm - 3:50pm	**Breakout Sessions:** A. **The Digital Age of Financial Services is Here... Clients are Ready, Are we?** – p*resented by Traci Mabrey, Head of Wealth Solutions, Broadridge* Changes in how investors and wealth managers collaborate, at first caused by Covid-19, are likely to remain long after the pandemic. Driven by the necessity of the moment, consumers of all demographics have embraced adoption of digitalization across every aspect of their personal lives. And, they are seeking virtualized client engagement and technology-driven personalization from those guiding their financial future. The digital age of financial services is here, and wealth management must transform and reimagine client relationships in order to survive and thrive in the new normal. B. **Income in A Zero-bound Interest Rate Environment**– *Presented by Gary Cloud, CFA, Senior Vice President, Co-CIO of Fixed Income, FCI Advisors and Ben Hill, CFA, Senior Vice President, Portfolio Manager, FCI Advisors* Session will be focused on fixed income, including the role of high yield and preferred stocks at prudent allocations, as well as equity investing. C. **Hot Topics in Compliance – From Cannabis and Opioids to a New Look at Disaster Recovery**– *Presented by Becky Kelly and Roger Pond, Fiduciary Education Center* Becky and Roger will discuss what the latest regulatory approach is to Cannabis. Additionally, they will discuss issues involving clients/beneficiaries dealing with Opioids. Lastly, they will comment on why Regulators expect you to overhaul your disaster recovery plan after the pandemic.
4:00pm - 4:50pm	**Breakout Sessions:** A. **All Things New in 2020** – *Presented by Accutech Systems* B. **Securities Class Action, Identifying Opportunities and Maximizing Recovery for your Clients**– *Presented by Brian Blockovich, Chicago Clearing Corporation* Filing claims to recover losses incurred from fraud in securities class action cases is a fiduciary duty. It is also a sound business practice for all investment officers. We will cover introduction and background, class action overview, opportunities for your clients, bank trust fiduciary duty, obstacles of filing internally, and opportunity for Q&A.

Tuesday, November 17th	
1:45pm - 2:00pm	**Lunch & Learn: Platinum Sponsor** *Presented by Reich and Tang* REICH & TANG
2:00pm - 2:50pm	**General Session – Accutech Systems Updates and Near-Term Roadmap** *Presented by Dan Wright, Executive Director, Strategy, Accutech Systems*
3:00pm - 3:50pm	**Breakout Sessions:** A. **Developing Your Sales Culture**– *Presented by Brandon Jeffress, Executive Director of Sales, Accutech Systems* Trying to grow organically while being squeezed on price are two of the major factors forcing leaders to evolve their sales culture. Brandon will share some of the methods from his book Stop Selling and Start Helping – The proven Guide to Phenomenal Sales Results that will help you build an effective sales culture. B. **Reposition Your Organization through Financial Planning: The New Normal of Advice**– *Presented by Joseph Maugeri, Certified Financial Planner (CFP) Board* CFP Board will discuss the major shifts taking place around the expansion of advice and how firms and advisors are adapting to the changes. There will also be a discussion of how advisors should be thinking about holistic advice and ways to transition their own practices to deliver on this expanded value proposition. C. **The Current State of Financial Crimes – The Criminals are Getting Craftier**– *Presented by Becky Kelly and Roger Pond, Fiduciary Education Center* Becky and Roger will discuss the surging regulatory crisis in money laundering and how this has become one of the primary concerns of Compliance, Regulators and Auditors. D. **Cheetah Admin & Inv Demo**– *Presented by Jeannie Adams, Solutions Consultant, Accutech Systems* With this session, we will demonstrate the administration and investment features of Accutech Cheetah™.
4:00pm - 4:50pm	**Breakout Session** A. **Recent tax law legislative and regulatory developments; Impact on the Elections on Tax Policy Outlook**– *Presented by Russ Sullivan, CCH* The program will cover legislative and regulatory tax developments in 2020, with an emphasis on the taxation of investments, capital formation, and businesses. We will examine the landmark COVID-19 legislation with a focus on the business tax provisions in those bills. In addition, we will look ahead to what tax policies might be in store for America's enterprises in 2021 after the November 2020 elections.
5:00pm - 6:00pm	**Trivia Event-** *Presented by MidAtlantic Capital Group* Join this fun, interactive, trivia style session covering a variety of topics. More information to come! MID ATLANTIC CAPITAL GROUP

Wednesday, November 18th	
1:45pm - 2:00pm	**Lunch & Learn: Platinum Sponsor** *Presented by Thomson Reuters*
2:00pm - 2:50pm	**General Session – Economic Outlook**– *Presented by Linda Duessel, Senior Equity Strategist, Senior Vice President, Federated Hermes* Pandemic! Unprecedented global response by fiscal and monetary authorities. The Economy—What to expect for jobs and consumers. The Market—What to expect for investors. Market structure and its effect on trading and stocks. The most dystopian election ever. The Long Term—good news and bad for the long-term investor.
3:00pm - 3:50pm	**Breakout Sessions:** A. **Innovation for all, not the few.** – *Presented by Justin Hendrix, Fifth Third* The rapid change of innovation can make it harder to see how decisions impact others. Justin Hendrix, VP, Sr. Manager, Innovation & Digital Messaging will share how innovative businesses can better understand the implications of their decisions, how to maintain high ethical standards, and how to reconcile those standards when business as usual is in flux. B. **The Value of Financial Planning** – *Jared Russ, LPL Financial* Whether it's the effect of COVID-19, generational wealth transfer, working with Millennials or trying to grow your business, the value of financial planning continues to be underestimated. Statistics show only 28% of adults have any type of written financial plan, we will discuss the value that financial plans can bring, such as on average, adults with a plan typically invest 92% more than those without a plan by the time of retirement. In this session, learn how to arm yourself with great advice for your clients on why they need to take the time to build their financial plan. C. **Automated Account Opening**– *Presented by Josh Rittenhouse, Product Manager, Accutech Systems* One of Accutech's newest products is a digital account opening solution. It can be used to onboard new client accounts into any modern system of record including Accutech's Cheetah product. This session will demo Opendigital from an applicant's point of view and dive into the flexibly of the system that allows you to accommodate nearly any account onboarding workflow imaginable. D. **Cheetah Ops Demo**– *Presented by George Brooks, Solutions Consultant, Accutech Systems* The demonstration of Accutech Cheetah™ will continue as we dive into traditional operations functions.
4:00pm - 4:50pm	**Breakout Sessions:** A. **Investment Enhancements**– *Presented by Matt Garrett, Product Manager, Accutech Systems* B. **All Things New in 2020** – *Presented by Jeannie Adams, Solutions Consultant, and George Brooks, Solutions Consultant, Accutech Systems*

Thursday, November 19th	
1:45pm - 2:00pm	**Lunch & Learn: Platinum Sponsor** *Presented by CAPIS*
2:00pm - 2:50pm	**General Session- Passion to Performance** – *Presented by Paul Kingsman, Advisor, Speaker, Author, and Olympic Medalist* In the midst of our ever- changing industry, distractions abound. Whether it's uncertainty about the political and economic climate, new regulations, or client expectations, distractions can rob you of your valuable time, energy, and emotion. They can easily derail you from performing at your best and building the business you want combining his experience of training for 13 years for a two-minute swimming event to win an Olympic medal by only 4/100ths of a second, along with his hands-on experience as a financial advisor, Paul Kingsman will teach you how to effectively develop and apply the principles and processes needed to create a distraction-proof business and succeed in a highly competitive environment.
3:00pm - 3:50pm	**Breakout Sessions:** A. **Insured Deposit Program: Market Update**- *Presented by Kevin Bannerton and Mark Thompson, Total Bank Solutions* This session will incorporate ongoing COVID preparedness with highlights and updates of the market and regulatory. B. **How the Global Pandemic has Changed Americans Psyche Towards Spending**- *Presented by Peter Dunn, Pete the Planner®, CEO and Founder of Your Money Line and Hey Money* During the past few months amidst the chaos have you considered how our relationship with convenience has changed? In this session, you will learn how convenience is being called into question. Have spending habits changed and are you confusing a comfortable lifestyle with stability? Including, all critical components to effective financial planning. C. **Cheetah Refresher Training**– *Presented by Jessica Bridgeman, Business Analyst, and Greg Lambert, Business Analyst, Accutech Systems* D. **Interactive Cheetah Panel**– *Presented by Kelly Waugh, Business Analyst, Iris Lewis-Beasley, Business Analyst, and Melissa Dinkel, Business Process Outsourcing Manager, Accutech Systems/Clients* E. **Interactive Gold Panel**– *Presented by Tiffany Cantrell, Client Support Specialist and LeAnn Windsor, Client Support Manager, Accutech Systems/Clients* F. **Interactive Moneytree Panel**- *Presented by Moneytree/Clients* G. **Cheetah Conversion**– *Presented by Jeannie Adams, Solutions Consultant, Accutech Systems* Join this session to learn about the things you can do today to best prepare for the transition and to help answer any question you may have.

4:00pm - 4:50pm	**Breakout Sessions:** A. **Cheetah Refresher Training Continued**– *Presented by Accutech Systems* B. **Interactive Cheetah Panel**– *Presented by Kelly Waugh, Business Analyst, Iris Lewis-Beasley, Business Analyst, and Melissa Dinkel, Business Process Outsourcing Manager, Accutech Systems/Clients* C. **10 Things You Did Not Know About Moneytree**- *Presented by Kristian Simmons, Solutions Consultant and Amy Hawkins, Client Support Specialist, Moneytree*