



2022 Conference Timetable

7:00-8:00 REGISTRATION, BREAKFAST, VISIT SPONSORS (Kay's Pier North)

8:00-8:50 KEYNOTE: *Post-Pandemic Positioning Ideas for 2022*, Ryan O. Issakainen, Senior Vice President, ETF Strategist ~ sponsored by First Trust 1 CFP

8:50-9:20 Coffee Break, Visit Sponsors in the Resource Center (Kay's Pier South)

	Track I <i>Kays Pier North</i>	Track II <i>Glass Ballroom</i>	Track III <i>Wagon Room</i>
9:25-10:15	<i>Incorporating ESG into Portfolios</i> Kathrin Forrest, American Funds Brie Williams, SsGA Moderated by Chris Lee, CFP 1 CFP	<i>Hot Topics in Estate Planning</i> Michael Clear and Erin Nicholls Wiggin & Dana 1 CFP, 1 Insurance	<i>Respect: The Ascendancy of Millennials & How the Future of Finance is More Female</i> Steven Chiavarone Federated Hermes 1 CFP
10:15-10:45 COFFEE BREAK...Visit Sponsors in the Resource Center (Kay's Pier South)			
10:50-11:40	<i>goRIA: Everything You Wanted to Know About Going RIA</i> Ryan Donovan, Orion Vince Leto, Raymond James Chris Mortara, Advisor Assist Moderated by Chuck Failla, CFP	<i>Medicaid Irrevocable Trust vs Long Term Care</i> Ruth Fortune Czepiga Daly Pope 1 CFP, 1 Insurance	<i>SuccessionFit</i> Tom Hine Capital Wealth Management
11:40-1:00 LUNCH SERVED (Kay's Pier North)			
12:00-1:00 KEYNOTE: <i>2022 Market Outlook and Key Investment Themes</i>, Mike Pollgreen, Greg Ortman and Kathrin Forrest ~ sponsored by CAP Group American Funds 1 CFP			
1:00 - 1:25 DESSERT AND VISIT SPONSORS IN THE RESOURCE CENTER (Kay's Pier South)			
1:30-2:20 KEYNOTE: <i>Inflation and Infrastructure Spending: What It Means for the Economy & Client Portfolios</i>, Michelle Butler, SVP ~ sponsored by Cohen and Steers 1 CFP			
2:20-2:45 COFFEE, SOFT DRINKS AND VISIT SPONSORS IN THE RESOURCE CENTER (Kay's Pier South)			
2:50-3:45	<i>PEPs: The 401K Solution For Advisors That Hate 401Ks</i> Ary Rosenbaum, Rosenbaum Law Jordan Merchbaker, FI360 Matthew Petralia, Newport Group Moderated by Chuck Failla, CFP 1 CFP, 1 Insurance	<i>The State of Business in CT and Legislative Update</i> Chris DiPentima, President and CEO, CBIA <i>Supported by NFP Personal Risk</i> 1 CFP, 1 Insurance	
3:50-4:40 KEYNOTE: <i>Geopolitical Issues That Will Forge Future Investment</i>, Frank Kelly, Founder, Fulcrum Macro Advisors, LLC ~ sponsored by DWS 1 CFP			
4:45-5:45 COCKTAIL HOUR (COMPLIMENTARY BEER, WINE, AND HORS D'OEUVRES), PRIZE DRAWINGS - Join the fun at the cocktail hour for a chance to win great raffle prizes from our sponsors, cash, and free registration for 2023!			