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<th>Time</th>
<th>Session</th>
<th>Speaker</th>
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<td>12:00 - 1:00</td>
<td>Registration</td>
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<td>1:00 - 1:15</td>
<td>Open &amp; Welcome</td>
<td>Doug Lennick</td>
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<td>1:15 - 2:00</td>
<td>How to Think Like an Innovator</td>
<td>Rohit Bhargava</td>
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<td>2:00 - 2:45</td>
<td>Language of Leadership</td>
<td>Lori Mackenzie</td>
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<td>2:45 - 3:00</td>
<td>Break</td>
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<td>3:00 - 3:45</td>
<td>Five Levels of Leadership</td>
<td>Ray Kelly</td>
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<td>3:45 - 4:30</td>
<td>Know More! Sales</td>
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What does it take to bring more innovative thinking into your organization? It is easy to think of innovation as a big ambitious and unreachable goal. We live in a business culture that celebrates innovation and creativity, but too often this priority is pushed to outside groups or feels too big to tackle. How can any team learn the right skills to anticipate and win the future by being more innovative every day?

In this keynote, participants will learn the five essential principles of leading transformation and building a team that sees the world differently.

Language is a powerful tool. The word choices we make shape the culture in your organization. Sometimes we are intentional in our language. However, often times our word choices are not deliberate or well thought out. In these instances, stereotypes about gender, ethnicity and other characteristics may inadvertently influence the words we choose in ways that can advantage some or disadvantage others on your teams. For example, we know from research that the feedback managers give women tends to be vague, less technical, less balanced—more focused on their communication style. In this workshop, you will learn how to master the language of leadership so that you can deliver feedback for impact, advocacy and growth of the men and women in your organization and with your clients. Learn to make strategic word choices so that you can be the best advocate for yourself, your peers and your teammates.

As your practice and organization continues to grow, the need to develop people to increase time becomes more and more important. In this presentation, learn a profoundly simple framework to begin to assess those in your practice and organization and actions you can take to begin the journey to develop them.

In today’s commoditized world, business is all about relationships and providing relevant value. When you know more about your prospects and clients, you’re better able to relate on a personal level, generate meaningful rapport, ask challenging questions, identify new leads, and generate powerful referrals. Most important, studies show that when you practice Sales Intelligence, you’ll win two times more business. In this dynamic presentation, you will discover “how to” to find information that you can use to engage with prospects and clients in ways that are relevant to what they care about.
THURSDAY, OCTOBER 24, 2019

7:30 - 8:00 BREAKFAST

8:00 - 8:15 WELCOME BACK
Doug Lennick

8:15 - 9:00 LEADING THE HEALTH & WEALTH CONNECTION
Mark Philips
In the health care insurance business, the business opportunity for those to be healthy is extremely important. Similarly, in financial services the business case for improved financial behaviors is becoming even more important. In this presentation learn from Mark Phillips, currently a United Healthcare executive and former Schwab executive, how he sees the health and wealth kaleidoscope coming together.

9:00 - 9:45 EMPATHY AND ITS ROLE IN HEALTH AND WEALTHCARE
Dr. Helen Riess
Dr. Helen Riess, a clinical Psychiatrist and Founder and Chief Scientific Officer of Empathetics, Inc., will present the groundbreaking evidence from her research at Harvard Medical School that empathy can be taught, and how empathy is the essential skill for delivering compassionate care. She will describe the powerful intersection between health and financial well-being and show how her findings from the neuroscience of empathy apply directly to financial advising and coaching relationships.

9:45 - 10:00 BREAK

10:00 - 10:45 RETHINKING HOW YOU APPROACH GROWTH - FIRESIDE CHAT WITH BRENT BRODESKI
Brent Brodeski
How you approach growth matters. In this conversation with Brent Brodeski, CEO of Savant Capital, he will outline the approach his company used to grow to $6 Billion in assets, which included 80% through organic growth, by putting people in the best possible situation to succeed. He will also discuss and answer questions about how he thinks about the evolution of the financial advisor’s role.

10:45 - 11:45 LEADING THE EVOLUTION OF FINANCIAL ADVICE
Doug Lennick
In this presentation Doug will be focusing on what is happening in the industry right now and what we believe will happen in the industry in the near future. As the industry landscape evolves, we are committed to show you how to create the future that you want rather than responding to someone else’s creation. Learn how you can leverage what’s available to provide more value to your clients and strengthen and increase the value of your practice. It is our position that if you take advantage of the new opportunities you will thrive.

11:45 - 12:00 CLOSE
Doug Lennick