

Agenda

MONDAY, May 19 | Overland Park Sheraton & Convention Center | 6100 College Blvd Overland Park, KS 66211

Start	End	Event
4:00 PM	7:00 PM	Registration and Sponsor Booths are Open Cottonwood Foyer
6:00 PM	8:00 PM	Welcome Reception and Networking Cottonwood 1 & 2

TUESDAY, May 20 | Overland Park Sheraton & Convention Center | 6100 College Blvd Overland Park, KS 66211

Start	End	Event
8:00 AM	9:00 AM	Breakfast is Available; Registration and Sponsor Booths Are Open Cottonwood 1 & 2
9:00 AM	9:10 AM	Welcome Mark Harris, vice president of strategy Cottonwood 3
9:10 AM	10:00 AM	Open for Excellence Marty Bicknell, CEO & president and Jen Hanau, national managing director Cottonwood 3
10:00 AM	11:00 AM	<i>A word from our Sponsor: BlackRock</i> Taking Flight with Investments Katrina Radenberg, CIO; Brett Kunshek, head of options & structured notes Cottonwood 3
11:00 AM	11:30 AM	Break Cottonwood 1 & 2
11:30 AM	12:20 PM	<i>A word from our Sponsor: Cantor Fitzgerald</i> Breaking Through the Noise: Digital Marketing That Works Gwendaline Mazzara, vice president, practice management & consulting, Fidelity; Kathryn Anastasio, senior vice president of marketing; Evan Beach, founder & president, Exit 59 Advisory Cottonwood 3
12:20 PM	1:30 PM	Lunch and Networking Cottonwood 1 & 2
1:30 PM	2:30 PM	<i>A word from our Sponsor: Blackstone</i> Future-Proof Your Business: Succession & Contingency Planning Kevin Barlow, former managing partner, Ocean Heights Advisors; Matt Lovejoy, managing director, advisor attraction; Bob Ciullo, director, advisor coaching & strategy Cottonwood 3
2:30 PM	3:15 PM	<i>A word from our Sponsor: Palmer Square</i> Helping Your Clients Sell Their Business Woodbridge: Kyle Richard, national managing director; Larry Reinharz, managing director; Jason Micalizzi, senior associate Cottonwood 3
3:15 PM	3:45 PM	Break Cottonwood 1 & 2
3:45 PM	4:45 PM	Keynote The Dirty Dozen: 12 Things NOT to Say to a Client Christina Lynn, director, wealth strategy Cottonwood 3
4:45 PM	5:00 PM	Closing Remarks Mark Harris, vice president of strategy Cottonwood 3
6:00 PM	9:00 PM	Evening Event at Chicken N Pickle 5901 W 135th St, Overland Park, KS 66223

WEDNESDAY, May 21 | Mariner Headquarters | 5700 W. 112th St., Suite 400, Overland Park, KS 66211

Start	End	Event
8:00 AM	9:00 AM	Breakfast and Networking The Galley - 4th floor
9:00 AM	9:20 AM	Welcome Amanda Green , <i>vice president of advisor experience</i> ; Mark Harris , <i>vice president of strategy</i> The Harbor - 4th floor
9:20 AM	9:30 AM	Travel Time to Roundtables
9:30 AM	10:00 AM	Mariner Roundtable* 4th floor
10:00 AM	10:15 AM	Presenters Travel Time to Next Session
10:15 AM	10:45 AM	Mariner Roundtable* 4th floor
10:45 AM	11:15 AM	Break
11:15 AM	11:45 AM	Mariner Roundtable* 4th floor
11:45 AM	1:15 PM	Lunch and Networking The Galley - 4th floor
1:15 PM	1:45 PM	Mariner Roundtable* 4th floor
1:45 PM	1:55 PM	Travel Time to Final Session
1:55 PM	2:30 PM	Closing Remarks and Share Your “Ah-Ha” Moment Jennifer Scaglione , <i>director, advisor coaching & strategy</i> ; Mark Harris , <i>vice president of strategy</i> The Harbor - 4th floor
2:30 PM		Event Concludes

***Mariner Roundtable (Four Rotating Sessions)**

Attendees will have the opportunity to attend all four roundtable sessions in small groups, allowing for in-depth discussions with each team. Each 30-minute session will be followed by a short break or transition time before rotating to the next discussion.

Topics include:

- **Private Investments** | [CAIS](#) with [Michael Glennon](#), *vice president, private investments*
- **Mariner Institutional** | [Jacob Peacock](#), *managing director, DC advisory services*
- **Growth with Advisor Coaching** | [Bob Ciullo](#), *director, advisor coaching & strategy*; [Jennifer Scaglione](#), *director, advisor coaching & strategy*; [Mark Harris](#), *vice president of strategy*
- **Tax and Financial Planning** | [Ryan Drake](#), *national director, tax*; [Alfred Cantilina](#), *wealth strategist*