INCLUSION FORUM

Friday, June 18, 2021

Time	Event
12:45 p.m. – 1:00 p.m.	**Arrival** *Update your profile and explore the event*
1:00 p.m. – 2:10 p.m.	**General Session** ▪ **Welcome & Opening Remarks** *Nena Chhoum, Senior Consultant, Advisor Diversity & Inclusion, LPL Financial* *Lauren Taylor Riley, Vice President, Advisor Diversity & Inclusion, LPL Financial* ▪ **CEO Remarks** *Dan Arnold, President and Chief Executive Officer, LPL Financial* ▪ **Inclusion Forum Agenda Review & Keynote Introduction** *Nena Chhoum, Senior Consultant, Advisor Diversity & Inclusion, LPL Financial* ▪ **How to Think Differently, Transform Your Business, and Achieve Your Most Important Goals** *Alex Banayan, Keynote Speaker* ▪ **Keynote Wrap Up & Transition to Break** *Nena Chhoum, Senior Consultant, Advisor Diversity & Inclusion, LPL Financial*
2:10 p.m. – 2:25 p.m.	Break / Transition to Breakout Sessions
2:25 p.m. – 3:10 p.m.	**Interactive Breakout Sessions** (choose one of three) ▪ **Mergers & Acquisitions: Finding the Right Fit and Executing with Confidence** *Ron Davidson, RL Davidson Consulting, LLC* *Johnny Rutledge, Rutledge Financial Partners* *Moderator: Sarah Cray, Assistant Vice President, M&A Solutions, LPL Financial* ▪ **Digital Engagement: Creative Ways to Expand Your Presence** *Marci Bair, Bair Financial Planning* *Terry Colen, Blackbridge Financial* *John Davila, TWG Wealth Partners* *Moderater: Emily Barrowclough, Digital Marketing Manager, Marketing Solutions, LPL Financial* ▪ **Practice Management: Building a Legacy Through Effective Practice Management** *Kash Ahmed, American Private Wealth* *Laurie Barela, Vargas Wealth Management* *Sally Ng, The Wealth Consulting Group* *Moderator: Dragos Ilie, Assistant Vice President, Relationship Management, LPL Financial*

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Time	Event
3:10 p.m. – 3:25 p.m.	Break / Transition to Roundtable Discussions
3:25 p.m. – 4:10 p.m.	**Faciliated Roundtable Discussions** (choose one of seven) **Leadership:** ▪ **Credentials to Enhance Your Business** *Michelle Balatero, Assistant Vice President, Advisor Diversity and Inclusion, LPL Financial* *Craig Horner, Sr. Financial Planning Consultant, National Sales & Consulting, LPL Financial* ▪ **Shifting Your Mindset from Financial Advisor to CEO** *Rashonne Darling, Assistant Vice President, Investment Products, Wealth Management Solutions, LPL Financial* *Ryan McClain, Vice President, Relationship Management, LPL Financial* **Growth:** ▪ **Staffing Your Practice For Growth** *Gina Ciampolillo, Vice President, Relationship Management. LPL Financial* *Teresa Hogan, Vice President, Advisor Learning Programs, LPL Financial* ▪ **Marketing your Practice in a Digital World** *Sarah LeBlanc, Vice President, Marketing, LPL Financial* *Katie Maxwell, Assistant Vice President, Marketing, LPL Financial* **Financial Planning:** ▪ **Designing & Determining Fee Structures & Financial Plans** *Roger Moulton, Sr. Financial Planning Consultant, National Sales & Consulting, LPL Financial* *Jared Russ, Assistant Vice President, Financial Planning Group, LPL Financial* **Efficiency:** ▪ **Optimizing Your Virtual Office During Changing Times** *Heather Broderick, Vice President, Business Management, Advisor Solutions* *David Cook IV, Vice President, Regional Business Solutions – East, LPL Financial* ▪ **Time Management & Prioritization** *Charis Jones, SVP, Business Risk Management, Home Office Supervisor, LPL FInancial* *Vance Kirksey, SVP, Culture & Talent Executive Education and Development, LPL Financial*
4:10 p.m. – 4:15 p.m.	Transition to Networking

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Time	Event
4:15 p.m. – 4:55 p.m.	**Advisor Business Community Networking** *Join your Advisor Business Community for informal introductions*
4:55 p.m. – 4:57 p.m.	Transition to Wrap Up
4:57 p.m. – 5:00 p.m.	**LPL Closing Remarks** *Lauren Taylor Riley, Vice President, Advisor Diversity and Inclusion, LPL Financial*