



2022 Deals & Dealmakers Summit Agenda

Day One: Wednesday, August 31st

Time	Topic
12:00 PM – 5:30 PM	Registration Open
1:00 PM – 3:00 PM	Ask the Experts & Networking Attendees have the opportunity to conduct meetings with industry subject matter experts. With over 30 experts on hand to choose from, wealth management dealmakers can: obtain solutions to important issues, create valuable connections and further relationships, and customize their learning experience. Just in case you aren't sure what to ask, these experts will be ready to introduce you to highly valuable concepts they came prepared to share. These scheduled, one-on-one networking sessions add a refreshing structure to meeting new, influential dealmakers and building long-term relationships.
3:00 PM – 3:30 PM	Networking Break
3:30 PM – 3:40 PM	Welcome and Introductory Comments – Dan Seivert, CEO and Managing Partner, ECHELON Partners
3:40 PM – 4:25 PM	A Review of Dealmaking Trends and Differentiators from Leading Buyers/Partners <u>Moderated By:</u> Rebecca Alcalay, Senior Vice President, Reverence Capital Partners <u>Featured Speakers:</u> Claire O’Keefe, Partner and Head of Corporate Development, Cerity Partners Cheryl Bicknell, COO and Chief Strategy Officer, Mariner Wealth Advisors
4:30 PM – 5:20 PM	Advanced Concepts of Deal Structuring, Valuation, & More <u>Moderated By:</u> Tim Welsh, President & CEO, Nexus Strategy <u>Featured Speakers:</u> Mike Wunderli, Managing Director, ECHELON Partners Barnaby Audsley, Vice President, ECHELON Partners Brett Mulder, Vice President, ECHELON Partners
5:30 PM – 7:00 PM	“Closing the Deal” Cocktails
7:00 PM – 9:00 PM	“Dealmakers Dinner” at Del Frisco’s



Day Two: Thursday, September 1st

Time	Topic
7:00 AM – 8:00 AM	Registration, Networking Breakfast
8:00 AM – 8:10 AM	Welcome and Introduction
8:10 AM – 8:55 AM	Deal Makers Guide to Organization Design and Behavior <u>Moderated By:</u> Katie Johnson, President, FiComm Partners <u>Featured Speakers:</u> Angie Herbers, CEO, Herbers & Company Stephanie Bogan, CEO, Limitless Advisor Coaching
9:00 AM – 10:20 AM	Keynote Debate <u>Moderated By:</u> Megan Carpenter, CEO, FiComm Partners <u>Featured Speakers:</u> Dan Seivert, CEO, ECHELON Partners Mark Tiberghien, Principal at Mark Tiberghien Insights, LLC
10:20 AM – 10:50 AM	Mid-Morning Break
10:50 AM – 11:30 AM	The Private Equity Lens on Investing in Wealth Management <u>Moderated By:</u> Gavin Spitzner, President, Wealth Consulting Partners <u>Featured Speakers:</u> Milton Berlinski, Co-Founder, Reverence Capital Partners
11:35 AM – 12:20 PM	A Practitioners Guide to Streamlining Technology Transitions in M&A <u>Moderated By:</u> Tim Welsh CEO of Nexus Strategy <u>Featured Speakers:</u> Tricia Rothschild, FinTECH and Global Wealth Management Executive Liz Fritz, Co-Founder, F2 Strategy Jene Hoosier, Head of Platform Development, Sanctuary Wealth
12:30 PM – 1:30 PM	Lunch & Networking
1:30 PM – 2:10 PM	Recruiting and Breakaway Deals – Wealth Creation from Business Model Migration <u>Moderated By:</u> Kathy Freeman, CEO of Kathy Freeman CO. <u>Featured Speakers:</u> Mindy Diamond, Founder and CEO, Diamond Consultants Kimberly Papedis, President, Fusion Financial Partners Jodie Papike, President, Cross Search



2:15 PM – 3:00 PM	Elite Level Marketing and Strategy for Buyers and Sellers <u>Moderated By:</u> Abby Salameh, Chief Marketing Officer, CAIS <u>Featured Speakers:</u> Megan Carpenter, CEO, FiComm Partners Susan Theder, Chief Marketing Officer, FMG Alyssa Riedel, Co-Founder, RDCL
3:00 PM – 3:30 PM	Break
3:30 PM – 4:15 PM	Lessons from Dealmaking in the TAMP Space <u>Moderated By:</u> Mike Wunderli, Managing Director, ECHELON Partners <u>Featured Speakers:</u> Mike Abelson, EVP Corporate Development, AssetMark Dana D'Auria, Group President, Envestnet Solutions Daniel Needham, President, Morningstar Wealth Management Solutions
4:20 PM – 5:10 PM	Battle of the Legal Counsel: Advisors for Buyers and Sellers Negotiate Key Deal Terms LIVE! <u>Moderator:</u> Naomi McKean, Senior Vice President & Deputy General Counsel, AssetMark <u>Featured Speakers:</u> Molly Crane, Partner, Blank Rome Linda Paullin-Hebden, Partner, Warner Norcross and Judd
5:10 PM – 5:20 PM	Recap, Review, and Thank You! <u>Featured Speakers:</u> Dan Seivert, CEO, ECHELON Partners
5:30 PM – 7:00 PM	"Deal Consummated" Cocktails
7:00 PM – 9:00 PM	Mark Tibergien Recognition Dinner