Schedule for the 2016 Technology Tools for Today T3 Enterprise Conference as of October 28, 2016 (Subject to Change)

November 2, 2016 - Wednesday Activities

Date	Time	Room - Condesa 4	Room - Condesa 5	Room - Condesa 6	Room - Condesa 7	Room - Condesa 8
Wednesday	1:00pm to 5:00pm	**Gold Sponsor Tech Lab Experience** featuring eMoney Advisor - Laser App Software - Oranj - Orion Advisor Services, LLC - Riskalyze - Twenty Over Ten	**Platinum Sponsor Tech Lab Experience** featuring Advicent Solutions	**Platinum Sponsor Tech Lab Experience** featuring Laserfiche	**Platinum Sponsor Tech Lab Experience** featuring MoneyGuidePro (PIEtech, Inc.)	**Platinum Sponsor Tech Lab Experience** featuring PlanPlus Inc.
Wednesday	1:00pm to 3:00pm	**Executive Round Table - By Invitation Only** - Special conference coverage by WealthManagement.com - Condesa 9				
Wednesday	4:00pm to 6:00pm	**Special Pre-Conference Workshop - Five Trends Changing Financial Services** - Matt Lynch, Managing Partner, Strategy & Resources, LLC - (www.StrategyAndResources.com) One of the financial services industry's top strategy consultants (along with select other special guest experts) will lead a discussion on how the right technology tools can help firms remain relevant by meeting changing advisor and consumer expectations. Free and open to all registrants but space is limited. **RSVP to Joy Trudics to reserve your seat: jTrudics@StrategyAndResources.com - Workshop located in Room - Condesa 9**				
Wednesday	6:00pm to 8:00pm	**2016 T3 Enterprise Conference Grand Opening Cocktail Party and Reception in Exhibit Hall - Brera 3/4**				

November 3, 2016 - Thursday Conference Sessions

Date	Time	Brera 1-2 (General Session Room)	Castellana 2 (General Session Room)
Thursday	7:00am to 7:45am	Continental Breakfast in Exhibit Hall - Brera 3/4	
Thursday	7:45am to 7:55am	Conference Welcome - Joel Bruckenstein	
Thursday	8:00am to 8:40am	**Laserfiche Forms Magic—Revolutionizing the New Account Opening Process** Linda Ding, Laserfiche and Tim Welsh, Nexus Strategy	
Thursday	8:40am to 9:20am	**Delivering Advice in the Post-DOL Era** - Bob Curtis, CEO, MoneyGuidePro (PIEtech, Inc.)	
Thursday	9:20am to 10:00am	**Creating a High Impact Digital Strategy** Pietro La Greca, VP, Corporate Development, Advicent Solutions	
Thursday	10:00am to 11:00am	Break with Sponsors in Exhibit Hall - Brera 3/4	
Thursday	11:05am to 11:45am	**miPlan - the Gen III robo that integrates industry best practices to reconcile the interests of investors, regulators...and financial services firms -** Shawn Brayman, President and CEO, PlanPlus, Inc. & Finametrica	

Thursday	11:45pm to 12:25pm	**Improving the Client Experience -** Joel Bruckenstein, Technology Tools for Today - Anthony Perkins, LPL Financial - David Berkowitz, Lincoln Financial Group - Frank J. McAleer, Jr., CIMA, Raymond James	
Thursday	12:30pm to 1:30pm	Lunch with Sponsors in Exhibit Hall - Brera 3/4	
Thursday	1:35pm to 2:15pm	**Exploring Advice - Financial Planning Panel -** Moderated by Kevin Knull, MoneyGuidePro (PIEtech, Inc)	
Thursday	2:20pm to 3:00pm	**Trending in Regulatory Compliance and Risk Mitigation -** Moderated by Brian Hamburger, Founder, President and CEO, MarketCounsel	
Thursday	3:05pm to 3:35pm	**Breaking Down the DOL with Technology: A Discussion on How DOL is Shaping Today's Leading Advisory Firms** - Eric Clarke, CEO,Orion Advisor Services, LLC, Kylee Beach, AGC of NorthStar Financial Services Groups, LLC, Mike Forker, CCO of CLS Investments, LLC	**Robo Technology & Complying with Today's Regulatory Environment** David Lyon Oranj
Thursday	3:40pm to 4:10pm	**Prove, Document, Review, Transform: Four Steps to Thriving Post-DOL** Kyle Van Pelt, Managing Director of Partnerships Riskalyze	**Taking FinTech to FidTech: How eMoney is Bridging the Fiduciary Technology Gap** - Matt Schulte, eMoney Advisor
Thursday	4:05pm to 4:45pm	Break with Sponsors in Exhibit Hall - Brera 3/4	
Thursday	4:50pm to 5:20pm	**Redefining Design in Finance -** Ryan Russell and Nick DiMatteo, Co-Founders, Twenty over Ten	**Advanced Analytics: What it is and Why it is Important -** Jason Leichtman, Director IT Product Management, Fidelity Investments
Thursday	5:20pm to 6:00pm	**The Impact of the DoL Rule -** Denise Valentine, Senior Analyst, Aite Group	
Thursday	6:00pm to 10:00pm	**T3 Enterprise Conference Networking Reception with Sponsors - CliQue (1st Floor - Cosmopolitan Hotel)**	

November 4, 2016 - Friday Conference Sessions

Date	Time	Brera 1-2 (General Session Room)	Castellana 2 (General Session Room)
Friday	7:00am to 7:50am	Continental Breakfast in Exhibit Hall - Brera 3/4	
Friday	8:00am to 8:40am	Flash Session: **Consistent Progress Through the Past, Present and Future** - Gabriel Cooper, Business Development Director, Advisors Assistant (8:00am-8:12am) Flash Session: **What's New with Redtail** - David Mehlhorn, Redtail Technology (8:14am-8:26am) FlashSession: **DOL, Meet CRM. 4 Ways CRM Can Ease Today's Fiduciary Challenges** - Robert DeFrancis, Junxure (8:28am-8:40am)	Flash Session: **Best Interest Solutions from Morningstar** - Nicolas Owens, Head of Technical Marketing, Morningstar (8:00am-8:12am) Flash Session: **Think Clone not Robo! The digitization of the wealth management practice** - David Coyle, Senior Vice President - Business Development, Vanare (8:14am-8:26am) Flash Session: **Leverage an efficient, systematic and scalable proposal process to grow your business** - Jonathan Georges, EquiSoft (8:28am-8:40am)
Friday	8:45am to 9:25am	**Cybersecurity** - Michael St. Vincent, CISO, and Philip Irby, SVP of IT, The Cosmopolitan of Las Vegas	
Friday	9:30am to 10:10am	**What's your software selection process? -** Moderated by Ryan Neal, Technology Reporter, Wealth Management Magazine, Catherine Bonneau, CEO Cetera Financial Institutions	

Friday	9:55am to 11:00am	Break with Sponsors in Exhibit Hall - Brera 3/4	
Friday	11:10am to 11:50am	Flash Session: **Leveraging Investment Policy Statements to Reduce Liability and Win Business** - John Faustino, AIF®, Chief Product and Strategy Officer, fi360 (11:10am-11:22am) Flash Session: **From Fear to Opportunity: How Technology Can Shift Perspectives on the DOL Fiduciary Rule** - Travis Champion, IFS, Managing Director, Business Development, Impact Financial Systems (IFS) (11:24am-11:36am) Flash Session: **Chetu & You: The Advantages of Having a Technology Partner with Expertise** Tobias Briegel, Chetu Inc. (11:38am-11:50am)	**BICE-ing with Laser App** - Robert Powell, VP of Sales and Marketing, Laser App Software (11:10am - 11:40am)
Friday	11:55am to 12:35pm	Flash Session: **Real-World Salesforce Integrations** - Sayer Martin, Orchestrate LLC(11:55am-12:07pm) Flash Session: **YCharts - The Financial Terminal of the web for RIAs** - Dave Lubnik - VP of Business Development, YCharts (12:09pm-12:21pm) Flash Session: **The Next ETF: Robo-Advice** - Michael Kerins, CFA,FRM, Founder & CEO, RobustWealth(12:23pm-12:35pm)	Flash Session: **Ensuring retirement income plans have integrity and strength** - Steve Swensen, Bucket Bliss (11:55am-12:07pm) Flash Session: **Advizr** (12:09pm-12:21pm) Flash Session: **Enhancing the Digital Experience for Advisors and Investors** - Patrick Yip, Pershing, a BNY Mellon Co. (12:23pm-12:35pm)
Friday	12:40pm to 1:40pm	Lunch with Sponsors in Exhibit Hall - Brera 3/4	
Friday	1:50pm to 2:30pm	Flash Session: **Just Say "NO" to Monte Carlo - The limitations of probability based retirement tools** - J.R. Robinson, Nest Egg Guru (1:50pm-2:02pm) Flash Session: **Rogue or Vogue: The Future of Rep as PM** - Rich Conley, Sawtooth Solutions (2:04pm-2:16pm) Flash Session: **Asset TV** (2:18pm-2:30pm)	Flash Session: **Getting Your Firm Ready to Support the DOL's Fiduciary Rule for Retirement Accounts** - Ted Tsung, CEO, AppCrown LLC (1:50pm-2:02pm) Flash Session: **Front Office Workflow fused with Your Back Office -** Alan Giancaterino, Docupace Technologies, Dave Woltman, FDS-Caesar (2:04pm-2:16pm) Flash Session: **Leveraging a "Risk Utility" for DOL Compliance Support and Keeping Clients on Plan** - Aladin Abughazaleh, Founder and CEO, ATA RiskStation, LLC (2:18pm-2:30pm)
Friday	2:40pm to 3:20pm	Flash Session: **Retirement Readiness for 401(k) Plan Participants** Edward Dressel, President, Trust Builders, Inc.(2:40pm-2:52pm) Flash Session: **Empowering Advisors Through Digital Innovation**, Steve Myers, RVP Sales, Jemstep (2:54pm-3:06pm) Flash Session: What I always wanted from my advisor...an Asset-Map - H. Adam Holt, ChFC®, Founder & Chief Executive Officer Asset-Map, LLC(3:08pm-3:20pm)	Flash Session: **Defending Against Cyber Attacks** Scott Busby, H2L Solutions, Inc.(2:40pm-2:52pm) Flash Session: **The Leading Solution for Demonstrating Best Interest: BrightScope's Exclusive Plan Data Network**, Jeremy Ross, CRO, BrightScope, Inc.(2:54pm-3:06pm) Flash Session: Envestnet, Inc.(3:08pm-3:20pm)