



Dec 5-7  
2018

BARRON'S WOMEN SUMMIT | THE BREAKERS

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## WEDNESDAY, DECEMBER 5, 2018

11:00 AM – 8:00 PM

### REGISTRATION

South Loggia

12:00 PM – 2:00 PM

### NETWORKING LUNCH

Ocean Lawn

2:00 PM – 4:00 PM

### PRE-CONFERENCE SESSION

Ponce 3

Recession Ahead? Investment Ideas for an Aging Expansion  
**Debra Brede**, D.K. Brede Investment Management Company Inc.  
**Brian Leach**, SVP, Fixed Income Strategist, PIMCO  
**Erin Leighty**, VP, Fixed Income Strategist, PIMCO  
Moderator: **Cady Johnson**, SVP, Account Manager, PIMCO

CFP I-W

5:00 PM – 6:30 PM

### COCKTAIL RECEPTION

Mediterranean Ballroom

6:30 PM – 8:30 PM

### WELCOME DINNER & SPEAKER

Venetian Ballroom

Crowdsourcing the Feminine Intelligence of the Planet: Women  
Transforming Technology for Good  
**Jensine Larson**, CEO & Founder, World Pulse

8:30 PM – 10:00 PM

### TOP 100 COCKTAIL RECEPTION

For Ranked Advisors Past & Present

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## THURSDAY, DECEMBER 6, 2018

7:00 AM – 5:00 PM

### REGISTRATION

South Loggia

Mediterranean Ballroom

Breakfast

8:00 AM – 8:10 AM

### WELCOME ADDRESS

Venetian Ballroom

**Sterling Shea**, Global Head, Dow Jones Wealth & Asset Management  
Group

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Issued 12/3/2018 at 12:20:20 PM



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BARRON'S WOMEN SUMMIT | THE BREAKERS

8:10 AM – 8:50 AM Venetian Ballroom	<b>GENERAL SESSION</b> Cybersecurity 101: Protecting Your Assets and Information in the Digital Age <b>Rachel Wilson</b> , Head of Cybersecurity for Wealth Management Technology, Morgan Stanley	CFP I-W
8:50 AM – 9:10 AM Mediterranean Ballroom	<b>REFRESHMENT BREAK</b>	
9:10 AM – 10:00 AM The Circle	<b>BREAKOUTS</b> Connecting to the Next Generation of Clients and Fostering Intergenerational Wealth Transfer <b>Stephanie Ackler</b> , Wells Fargo Advisors <b>Emily Rubin</b> , UBS Financial Services Inc. Moderator: <b>Sharon Oberlander</b> , Merrill Lynch Wealth Management	I-W
Ponce 3	After the Mid-Terms: Investors Guide to Political Risk <b>Marina Gross</b> , EVP of the Portfolio Research and Consulting Group, Natixis Investment Managers <b>Stephanie Kelly</b> , Senior Political Economist, Aberdeen Standard Investments Moderator: <b>Jana Shoulders</b> , Mariner Wealth Advisors	CFP I-W
Ponce 4	Executive Presence and Personal Brand <b>Liz Brunner</b> , Founder & CEO, Brunner Communications	
Ponce 5	How Much Are You Paying for Liquidity? <b>Aimee Almeleh</b> , SVP, Alternative Strategist, PIMCO Interviewer: <b>Christina Boyd</b> , Merrill Lynch Wealth Management	CFP I-W
10:00 AM – 10:20 AM Mediterranean Ballroom	<b>REFRESHMENT BREAK</b>	

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10:20 AM – 11:10 AM

The Circle

### BREAKOUTS

Three Legs of the Stool: Know Who to Call for Client Healthcare Needs

**Lindsay Jurist-Rosner**, Founder & CEO, Wellthy

**Arden O'Connor**, Founder & CEO, O'Connor Professional Group

**Bruce Spector**, Founder & Chairman, PinnacleCare

Moderator: **Mary Deatherage**, Morgan Stanley Private Wealth Management

Ponce 3

Macro Market Outlook: Quantitative Tightening - So Far So Good

**Jeffrey Sherman**, Deputy CIO, DoubleLine

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Ponce 4

Most Effective Strategies for Business Growth

**Emily Bach**, Morgan Stanley Wealth Management

**Linnell Sullivan**, Merrill Lynch Wealth Management

Moderator: **Nela Richardson**, Senior Investment Strategist, Edward Jones

Ponce 5

An Analysis of ESG Investing Today & What's Next

**Nina Hodzic**, VP, Senior ESG Specialist, Allianz Global Investors

**Sarah Lee Kjellberg**, Head of U.S. iShares Sustainable ETFs, BlackRock

**Amy O'Brien**, Managing Director, Head of Responsible Investment, Nuveen

Moderator: **Anouchka Balog**, Morgan Stanley Wealth Management

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11:10 AM – 11:30 AM

Mediterranean Ballroom

### REFRESHMENT BREAK

11:30 AM – 12:20 PM

Venetian Ballroom

### GENERAL SESSION

Women at the Helm: How I Made it Happen

**Yie-Hsin Hung**, CEO, New York Life Investment Management

**Linda Martinson**, President and COO, Baron Capital

Moderator: **Leslie Lauer**, UBS Financial Service Inc.

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12:20 PM – 1:30 PM

Venetian Ballroom

### LUNCH & ROUND TABLE DISCUSSIONS

To enhance the value of our program this year, we have decided to add structured discussion groups to coincide with lunch. If you plan to participate, please come prepared with one "actionable idea" to share with your table. After everyone shares their idea, we hope for there to be a meaningful dialogue on what the best ideas are and why. At the end of the segment, each table will vote on the best idea, which Barron's will collect. The list of best ideas from each table will be distributed to all. All attendees of the conference are welcome to participate - please sit at any table in the ballroom with indicated signage in the back of the room. If you choose not to participate in the structured groups, there will be plenty of tables to enjoy lunch in a more casual setting.

1:30 PM – 1:40 PM

Mediterranean Ballroom

### REFRESHMENT BREAK

1:40 PM – 2:30 PM

The Circle

### BREAKOUTS

Defining True 'Value': Innovations in Your Client Service

**Jennifer Marcontell**, Edward Jones

**Kimberlee Orth**, Ameriprise Financial

Moderator: **Kim Jenson**, Chief Operating Officer, Raymond James & Assoc.

Ponce 3

Behavioral Finance: How Human Tendency Affects Investment Returns

**Ellen Chenoweth**, Investment Research Analyst, FlexShares

**Michael Natale**, Head of Distribution, FlexShares

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Ponce 4

Flow: Experience Your Best Self Through Mindful Living

**Kristen Brogan**, Chief Nutritional Officer, On Target Living

Ponce 5

The Generations Project US - The Women's Narrative

**Christina Boris**, Client Research Director, OppenheimerFunds

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2:30 PM – 2:50 PM

Mediterranean Ballroom

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2:50 PM – 3:40 PM

The Circle

### BREAKOUTS

Hiring Top Talent & Preparing The Next Generation of Leaders on Your Team

**Valerie Newell**, Mariner Wealth Advisors

**Sharon Sager**, UBS Financial Services Inc.

Ponce 3

Leveraging Your Time with Technology: Creating Efficiencies in Your Life & Practice

**Milissa Hutchinson**, Senior Relationship Manager, Delaware Funds by Macquarie

**Rachel Jacobs**, Head of Strategic Relationship Management, Delaware Funds by Macquarie

Ponce 4

“Strategic Dressing”: Using Your Wardrobe to Create Influence and the Focus to Achieve Your Goals

**Dara Lamb**, Founder, Dara Lamb Atelier

Ponce 5

The New Retirement Frontier: How to Prepare Clients' Mindsets and Investments

**Jan Blakeley Holman**, Director of Advisor Education, Thornburg Investment Management

**Jane Henshaw**, Head of Digital Decision-Making and Experimentation, Vanguard Center for Investment Research, Vanguard

**Katherine Roy**, Chief Retirement Strategist, J.P. Morgan Asset Management

Moderator: **Anna Winderbaum**, Morgan Stanley Private Wealth Management

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3:40 PM – 4:00 PM

Mediterranean Ballroom

### REFRESHMENT BREAK

4:00 PM – 5:00 PM

Venetian Ballroom

### GENERAL SESSION

Adding Value in a Race to Zero

**Heather Hunt-Ruddy**, Head of Client Experience and Growth, Wells Fargo Advisors

5:00 PM – 6:00 PM

Mediterranean Ballroom

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## FRIDAY, DECEMBER 7, 2018

7:00 AM – 11:00 AM

### REGISTRATION

South Loggia

Mediterranean Ballroom

Breakfast

8:00 AM – 8:40 AM

### GENERAL SESSION

Venetian Ballroom

Special Guest Speaker

**Martha Stewart**

Interviewer: **Tricia Kasner**, Managing Director, Dow Jones Wealth & Asset Management

8:40 AM – 8:55 AM

### REFRESHMENT BREAK

Mediterranean Ballroom

8:55 AM – 9:45 AM

### BREAKOUTS

Ponce 3

Fostering New Business Growth Through an Effective Marketing Campaign

**Louise Armour**, JP Morgan Securities

**Rosa Rita**, Managing Director & Chief Marketing Officer, JP Morgan Securities

Ponce 4

A Look Into Blockchain and Cryptocurrency

**Kristina Hooper**, Chief Global Market Strategist, Invesco

**Colin Moore**, Global Chief Investment Officer, Columbia Threadneedle

Moderator: **Nancy Popovich**, Managing Director, Baird

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Ponce 5

What Was and What Will Be: Clients in Transition - A Case Study

**Emily Scott**, Founder, Emily Scott AND

CFP

9:45 AM – 9:55 AM

### REFRESHMENT BREAK

Mediterranean Ballroom

9:55 AM – 10:45 AM

### BREAKOUTS

Ponce 3

ROI of Art

**Anita Heriot**, President, Pall Mall Art Advisors

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- Ponce 4                      Life and Leadership: What Is Success and Balance?  
**Laura Palmer**, Head of U.S. Intermediary Distribution, Amundi Pioneer  
**Dee Sawyer**, Head of Human Resources, T. Rowe Price  
**Kris Spazafumo**, VP of Investment Services & Business Development of  
Model Portfolios, American Funds  
Moderator: **Mary Sumners**, Regional President, Wells Fargo Advisors
- Ponce 5                      Trust and Conversational Intelligence  
**Judy Beatrice**, Co-Founder, Hyperion 360 Solutions
- 10:45 AM – 10:55 AM                      **REFRESHMENT BREAK**  
Mediterranean Ballroom
- 10:55 AM – 11:35 AM                      **GENERAL SESSION**  
Venetian Ballroom                      President Trump: The Future of U.S. Foreign Policy and America's Role in  
the World  
**Anja Manuel**, Founding Partner & Principal, RiceHadleyGates, LLC

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