BARRON'S

BOSTON REGIONAL SUMMIT

JUNE 24, 2015 | OMNI PARKER HOUSE HOTEL

Attendees can apply for 2 CE CFP Credits & 3 CE hours toward CIMA®/CIMC®/CPWA® designations. See Registration Desk for details.

1:30pm **Registration**

2:00pm **Welcome Address**

- **Gary Holland**, Publisher & Vice President, Advertising, *Barron's*

2:10pm **Companies Not Countries** [CFP | IMCA]

As globalization continues to make the world smaller, we believe that finding great opportunities has more to do with the companies themselves, than the countries in which they are headquartered. OppenheimerFunds Global Equity team's investment philosophy is predicated on finding companies, regardless of domicile, that may benefit from powerful long-term structural growth themes. The panelists will discuss how they evaluate new opportunities and uncover quality companies across the globe.

- **George Evans**, CFA, CIO Equities, Portfolio Manager, International Growth Fund
- **Frank Jennings**, Ph.D., Portfolio Manager, Global Opportunities Fund
- MODERATOR: **Mike Quinn**, Client Portfolio Manager, Global Equity Team

3:00pm **Vision in Action: Evolving Your Business for Success** [IMCA]

In this interactive panel discussion, three veteran advisors will share insights on how they are evolving and adapting their approaches to create better client outcomes and sustained growth in their business. Conversation topics will include best practices and lessons learned on managing teams, clients and investments in an unpredictable market.

- **Greg Miller**, Wellesley Investment Advisors, Inc
- **Peter Noonan**, J.P. Morgan Securities
- **Raju Pathak**, Morgan Stanley Wealth Management
- MODERATOR: **Matt Barthel**, Associate Editor, *Barron's*

3:50pm **Refreshment Break**

4:00pm **Compelling Wealth Management Conversations: Move Your Clients to Action** [CFP | IMCA]

We are a left-brain industry talking to a right-brain client, and as a result we are occasionally clear and rarely compelling in our conversations. We are often more comfortable with data, charts and graphs than with analogy, metaphor and story. Clients use the former to inform and justify their decisions but the latter to actually make those decisions. You need to master both so you capture their head and their heart, which allows them to not only understand your business model and recommendations, but also take the appropriate actions.

- **Brian Levitt**, Investment Strategist, OppenheimerFunds

5:00pm **Discussion Groups**

Marketing & Branding: Peter Princi, Graystone Consulting
New Investment Themes: John Habig, Morgan Stanley Wealth Management
Planning & Service for HNW Clients: Brian Strachan, Morgan Stanley Private Wealth Management
Succession Planning: Robert Bonfiglio, Ameriprise Financial
Team Leadership: Raj Sharma, Merrill Lynch - PBIG
The Client Experience: Malcolm Makin, Raymond James

5:50pm **Barron's Top Advisors Awards**

6:00pm **Cocktails & Networking Reception**