

Partner Roundtable Sessions - 1-2pm

ORGANIZED IN THE SPIRIT OF SMALL GROUP LEARNING AND INFORMAL CONVERSATION, EACH ROUNDTABLE IS HOSTED BY AN FPA OF MIAMI PARTNER WHO WILL INITIATE A LIVELY EXCHANGE ABOUT A TOPIC OR INDUSTRY TREND.

ROUNDTABLES WILL COMPRISE OF 3*20 MINUTE SESSIONS:

ROUNDTABLE #1 - CORAL GABLES TRUST - RICHARD DENAPOLI
TOPIC "THE BENEFITS OF A TRUST FOR YOUR CLIENTS"

ROUNDTABLE #2 - PENSION SERVICES INC. - ROBERT PENAFIEL
TOPIC "MAXIMIZING ASSETS UNDER MANAGEMENT THROUGH CUSTOMIZED RETIREMENT PLANS"

ROUNDTABLE #3 - ARES WEALTH MANAGEMENT SOLUTIONS LLC - BARRY MILLER
TOPIC "DEMOCRATIZATION OF PE SECONDARIES "

ROUNDTABLE #4 - BANNA FAKHOURY MIAMI HOMES - BANNA FAKHOURY
TOPIC "SOUTH FLORIDA: STATE OF THE REAL ESTATE MARKET "

ROUNDTABLE #5 - BLUEROCK CAPITAL MARKETS - ADAM LOTTERMAN
TOPIC "OUTLOOK FOR INSTITUTIONAL PRIVATE EQUITY RE"

ROUNDTABLE #6 - CAIS - BRIAN DALEY
TOPIC "SCALING WITH ALTERNATIVE INVESTMENTS"

ROUNDTABLE #7 - HINES SECURITIES - TRAVIS CONLAN
TOPIC "TAXES, TIMING AND GROWTH, WHY REAL-ESTATE MAKES SENSE AS A PORTFOLIO POSITION"

ROUNDTABLE #8 - INVESCO - SHANE SCHOFIELD
TOPIC "1031/721 EXCHANGES A NEW WAY TO INVEST IN PRIVATE REAL ESTATE"

ROUNDTABLE #9 - NATIONWIDE - MITCH ANGLIN & JEFF GRAYSON
TOPIC "CLIENT-FACING HEALTH CARE AND SOCIAL SECURITY VALUE ADD TOOLS WITH NATIONWIDE FINANCIAL"

ROUNDTABLE #10 - PIMCO - BRIAN KYLE - PIMCO (HEAD OF ADVISOR SOLUTIONS)
TOPIC "PREPARING FOR THE PIVOT"

ROUNDTABLE #11 - SHELTON CAPITAL MANAGEMENT - PETER HIGGINS (HEAD OF FIXED INCOME)
TOPIC "WHEN IS IT TIME TO MOVE CLIENTS OUT OF UST-BILLS AND INTO ACTIVE FIXED INCOME?"

ROUNDTABLE #12 - SIT MUTUAL FUNDS - CONNER MURNIGHAN
TOPIC "DO YOU USE ETFS, MUTUAL FUNDS OR BOTH? OVER THE PAST COUPLE OF YEARS, HAVE YOU STARTED TO USE ONE MORE THAN THE OTHER?"

ROUNDTABLE #13 - T ROWE PRICE - WAYNE EWAN & KATIE ERICH
TOPIC "PROSPECTING THE NEXT WAVE OF WEALTH"

ROUNDTABLE #14 - VANGUARD FINANCIAL ADVISOR SERVICES - ROSE UZUNOVA
TOPIC "ALLOCATING FIXED INCOME IN THE CURRENT MARKET ENVIRONMENT WITH VANGUARD"

ROUNDTABLE #15 - WEITZ INVESTMENTS - JOE MERLO
TOPIC "FIXED INCOME - FINDING OPPORTUNITIES OUTSIDE OF TRADITIONAL AGG"

PLATINUM PARTNERS

CORAL GABLES
TRUST
Stands Apart



PARTNERS

Allianz ARES

WEALTH
MANAGEMENT
SOLUTIONS

BANNA FAKHOURY
MIAMI HOMES EXPERT

Bitwise

BLUEROCK
CAPITAL MARKETS LLC
MEMBER FINRA | SIPC

CAIS

charles
SCHWAB

Own your tomorrow.



First Trust
Global Portfolios

Hines
GLOBAL INCOME TRUST



Invesco

ISLAND SKY
INVESTMENTS



Mutual of Omaha

Nationwide

Nicklaus
Children's
Hospital
FOUNDATION

PIMCO



SHELTON
CAPITAL MANAGEMENT

Sit Investment Associates
Sit Mutual Funds



Vanguard Weitz | INVESTMENT
MANAGEMENT