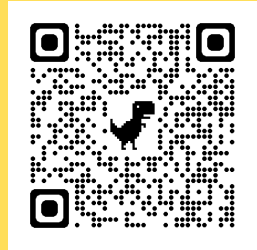




18TH ANNUAL SYMPOSIUM
OCTOBER 19, 2023

SHARE VIA SOCIAL MEDIA



FPA of Miami Symposium

Doors open at 8:00 AM
October 19, 2023

Rusty Pelican
3201 Rickenbacker Cwy
Key Biscayne, FL 33149



Program Flow

BREAKFAST/NETWORKING WITH SPONSORS | 8:00 - 8:45 AM

OPENING REMARKS | 8:45 - 9:05 AM

KEYNOTE #1 | 9:05 AM

TOPIC - "ECONOMIC OUTLOOK DISCUSSION"

JASON BLOOM

HEAD OF FIXED INCOME AND ALTERNATIVES ETFS
INVESCO



STEVE CHIAVARONE

HEAD OF MULTI-ASSET SOLUTIONS, EQUITY STRATEGIST
FEDERATED HERMES



MEERA PANDIT

GLOBAL MARKET STRATEGIST
J.P. MORGAN ASSET MANAGEMENT



WAYNE EWAN

VICE PRESIDENT - T. ROWE PRICE INVESTMENT SERVICES, INC.
PANEL MODERATOR



KEYNOTE #2 | 10:05 AM

TOPIC - THE DEMOCRATIZATION OF PRIVATE MARKETS

BARRY MILLER

PARTNER
ARES SECONDARIES GROUP



ADAM LOTTERMAN

CO-FOUNDER AND CO-CIO
BLUEROCK FUND ADVISORS



ADAM HANSON

REGIONAL CONSULTANT GRIFFIN CAPITAL SECURITIES ("GCS"),
A SUBSIDIARY OF APOLLO GLOBAL MANAGEMENT



BRIAN DALEY

VICE PRESIDENT | PRODUCT SPECIALIST
CAIS
PANEL MODERATOR



CONCURRENT SESSION #1 | 11:05 AM

TOPIC - RETIREMENT PLANNING-

"HOT PROBLEMS ADVISORS ARE FACING TODAY IN RETIREMENT PLANNING"

MARCIA MANTELL

OWNER, MANTELL RETIREMENT CONSULTING, INC.



ROBERT POWELL

COLUMNIST, RETIREMENT, MARKETWATCH

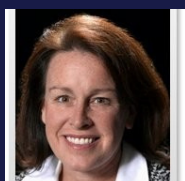


CONCURRENT SESSION #2 | 11:05 AM

TOPIC - LUXURY ASSETS - PASSION, STATUS, INVESTMENT! PANEL DISCUSSION

COLLEEN BOYLE

MANAGING DIRECTOR-NATIONAL SALES AT THE FINE ART GROUP



CHRISTIAN BOEHM

CEO & FOUNDER-JAXSON MAXIMUS



OJ WHATLEY

FOUNDER OF SECONDTIME.COM



CLARISSA RODRIGUEZ

ART LAWYER - HARPER MEYER
PANEL MODERATOR



LUNCH - PRO BONO DISCUSSION | 12:00 - 1:00 PM

PARTNER LED ROUND TABLE DISCUSSIONS | 1:00-2:00 PM

TOPIC - VARIOUS (SEE SEPARATE SCHEDULE)

KEYNOTE #3 | 2:10 PM

TOPIC - "SHOW DON'T TELL: THE POWER OF USING VISUALS TO DELIVER EFFECTIVE WEALTH MANAGEMENT ADVICE"

ROSS RISKIN

CHIEF LEARNING OFFICER @ INVESTMENTS & WEALTH INSTITUTE | CHIEF CREATIVE OFFICER @ VISIWEALTH.ORG



KEYNOTE #4 | 3:10 PM

TOPIC - REAL ESTATE DISCUSSION

BANNA FAKHOURY

GLOBAL REAL ESTATE ADVISOR AT ONE SOTHEBY'S INTERNATIONAL REALTY



TRAVIS CONLAN

REGIONAL DIRECTOR - HINES SECURITIES, INC
PANEL MODERATOR



ARIELLA GUTMAN

PARTNER - HABER LAW



KEYNOTE #5 | 4:10 PM

TOPIC - THE PROCESS

BRIAN GALLERY

SENIOR VP - HEAD OF STRATEGY & CONSULTING
FIRST TRUST

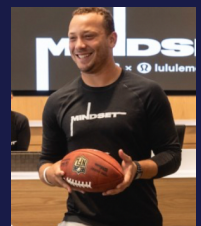


CLOSING REMARKS & RAFFLES | 5:20 - 5:30 PM

NETWORKING RECEPTION | 5:30 - 7:30 PM

SPECIAL GUEST - ALEC INGOLD MOTIVATIONAL SPEAKER

MIAMI DOLPHINS FULL BACK



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