Wealth Engineering Conference Agenda

Monday, March 27th

7:30 - 8:30	***Breakfast — Hosted By BDO CPA Alliance***	
8:30 - 10:00	Blueprinting the HNW advisory ecosystem for the digital age. Design your Wealth Advisory Multi-Family Office Dashboard. Built on a holistic, elastic infrastructure for families and their enterprises.	Nick Gregory · CEO of Wealth Advisors Hub
10:00 - 10:15	***Break — Hosted By Givinga***	
10:15 - 11:00	Blend everything you need in order to serve your HNW Families as their Wealth Custodians on a virtual basis.	Chirag Nanavati & Robin Williams · Managing Directors of Vantage
11:00 - 11:45	Partnering with local CPA Firms to deepen your client offering. Create a cross-referral platform with enhanced planning capabilities.	Robert Merl · National Practice Director of BDO Alliance USA
11:45 - 12:45	***Lunch — Hosted By UX Wealth Partners***	
[redacted]		
1:30 - 1:45	***Break — Hosted By Slavic 401k***	
1:45 - 2:30	A fully integrated platform for tax-qualified retirement plans. Single Employer Plans - Pooled Employer Plans - IRAs	David Herlihy · Senior Vice-President at Slavic401k John Slavic · CEO at Slavic401k
2:30 - 3:15	Learn a new language in communicating, on-the-fly, with advisory clients. A customizable, interactive, voice activated mobile app.	Mitch Morrison · CEO of Eyeballs Financial Brian Fitzgerald · CTO of Eyeballs Financial Bill Burks · President of Eyeballs Financial
3:15 - 4:00	Integrating private banking solutions into your practice. Securities based lending - FDIC Insurance Deposit Programs - Liquidity Solutions	John Leto · EVP, Head of Institutional Banking at The Bancorp Bank Joseph Bennett · Head of National Accounts of The Bancorp Bank
4:00 - 4:45	Including comprehensive trust services and estate administration into your wealth management offering.	Michelle Diamond, CFTA · Chief Development Officer at Cumberland Trust
4:45 - 5:30	Simplify asset management into one turnkey platform: Investment Management - Marketing - Support - Tech Stack - Design	Kyle Wiggs · CEO of UX Wealth Partners
5:30 - 6:15	Converting taxable capital into charitable capital - planned giving redefined. CRTs - CLTs - CGAs - DAFs - PIFs - Private Foundations - Give@Work. A cloud based micro donor advised fund platform - Philanthec®	Nick Gregory · CEO of Charitable Capital Dave Gilmartin · CMO of Givinga

Tuesday, March 28th

7:30 - 8:30	***Breakfast — Hosted By The Bancorp Bank***	
8:30 - 9:15	An estate planning digital platform built for wealth advisors.	Matt Morris · CEO at Encorestate Plans
9:15 - 10:00	Putting tax advisors in control of their client's tax records. See what the IRS sees virtually, on-demand.	Charles Hayes · SVP of Revenue at Tax Status
10:00 - 10:15	***Break — Hosted By Cumberland Trust***	
10:15 - 11:00	Integrate the passion, spirit and commitment of purposeful giving into the fabric of the families you serve.	John A. Warnick, Esq. · Founder of The Purposeful Planning Institute
11:00 - 11:45	Bridge the wealth planning gaps to master the planning maze at scale. Holistic integration - Checklists and spread sheets are gone forever.	Nick Gregory · CEO of The Wealth Engineering Hub