

NextGen Agenda

When we talk about NextGen, we don't just mean young advisors. We're serious about bringing more women, people of color, veterans, and career changers to the table to provide more relevance to prospective clients. Here are some sessions designed to help you attract the next generation of advisors and clients.

Wednesday, February 6

10 business building ideas for Emerging Advisors

10:10AM-11:00AM

Kate Healy, Managing Director, Generation Next, TD Ameritrade Institutional

Kelly Bradley, Financial Planning Assistant, Trinity-Wealth Management

Alan Moore, Co-Founder & CEO of XY Planning Network

Marjorie Wentz, Retirement Plan Advisor, Trinity-Wealth Management

1 IMCA CE Credit

From working moms to young investors, not only is the investing landscape changing; so is the RIA space. As new advisors emerge, how can we think differently about how to support them and their clients? One idea: Pair up clients with associates in your firm with similar backgrounds. In this session, you'll get tips to strategically build your business and cultivate relationships that are mutually beneficial. #RIANextGen

Thursday, February 7

How do you find talent that helps broaden your reach?

2:05PM-2:55PM

Audra Bohannon, Senior Client Partner at Korn Ferry Hay Group

1 IMCA CE Credit

Audra Bohannon, a Senior Partner at Korn Ferry Hay Group, has delivered strategic leadership and business development solutions that propel people and organizations toward their goals. In this session, Audra will help you look to your business's future by addressing contemporary issues such as biases, cultivating conscious inclusion, and creating a workplace that supports diversity, all of which will allow you to be better prepared to build a forward-thinking and forward-looking organization. #RIANextGen

NextGen celebration: Student-Advisor meet and greet

5:45PM-7:30PM

Help us celebrate 10 years of RIA NextGen growth at this special event designed to facilitate meaningful conversations between Advisors and the next generation of advisors. Want to get a jump on filling your talent pipeline? This is the perfect venue to make those connections.

Friday, February 8

Behavioral Finance 101 – Ten ways to help manage client expectations and behavior

11:00AM–11:50AM

1 CFP CE Credit; 1 IMCA CE Credit

Why do clients do what they do? They're all different, and they all have different motivations. Between spending, investing, trading, financial planning, and portfolio management, understanding clients' behaviors and what's behind them can influence how you work with them, and ultimately help you manage expectations. In this session, you'll learn how to put into practice some of the basic concepts of behavioral finance, understand different types of clients, and improve your working relationships. #RIANextGen

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