

Tech/Ops agenda

Need help finding the right tech, making the most of what you already have or streamlining your daily operations? We've got you covered with sessions and other experiences to help you drive efficiency and explore what's on the tech horizon.

Wednesday, February 6

Veo One: More features, integrations, analytics, and power

9:00AM–9:50AM

Chris Valleley, Director, Technology Solutions, TD Ameritrade Institutional
Michael Madrid, Product Manager, Technology Solutions, TD Ameritrade Institutional
1 IMCA CE Credit

A lot has happened in Veo One over the past year. New features. Added integrations. Powerful analytics. Veo One is continually evolving to keep pace with your ever-changing needs. And because all Veo functionality is now available in Veo One, there's no reason to wait any longer to make the switch. Join us to learn what's new with the platform and get ready to unify your technology with Veo One.

Morning workshop: Get started with Veo One

9:00AM–12:00PM

Rey Pajarillo, Senior Product Manager, Technology Solutions, TD Ameritrade Institutional
Charles Fargo, Product Manager, Technology Solutions, TD Ameritrade Institutional
3 IMCA CE Credits

Get ready to get excited about Veo One. Streamlined, simplified, and integrated, it gives you the power to take care of client management needs from one unified view. Join us to learn how to set up your user preferences and vendor integrations and find out about new features like consolidated views, activity management, and more. Don't miss out!

Morning workshop: iRebal on Veo: Go from newbie to user

9:00AM–12:00PM

Jessica DeMartino, Product Manager, iRebal, TD Ameritrade Institutional
Michael King, Senior Specialist, iRebal, TD Ameritrade Institutional
3 IMCA CE Credits

New to iRebal? Roll up your sleeves and get ready to learn how to take advantage of this powerful rebalancing technology. During this highly interactive session, you'll discover how you can help maximize your efficiency in portfolio monitoring, rebalancing, and model management. And if you don't already have access to iRebal, we'll get you set up to rebalance portfolios in your firm's iRebal environment in real-time.

iRebal on Veo: Discover user-friendly, intelligent rebalancing

10:10AM–11:00AM

Justin Di Filippo, Director, Technology Solutions, TD Ameritrade Institutional

1 IMCA CE Credit

Smart rebalancing technology can help you potentially reduce the cumbersome manual rebalancing process from days (or even weeks) down to minutes. This live demonstration of the features and benefits of iRebal on Veo - the most widely adopted and highest-rated rebalancing platform* – encompasses everything from household rebalancing and cash management to model management and tax loss harvesting** any time of the year. Understand how iRebal and Model Market Center™ were designed to help you increase efficiency so you can spend less time with spreadsheets and more time serving your clients. All within a user-friendly platform.

* 2018 T3 / Advisor Perspectives / Inside Information Software Survey.

** iRebal offers a flexible tax harvesting feature that allows you to set various loss thresholds for taxable accounts, total loss targets for portfolios, and choose a replacement security for each harvested security. Once the thresholds have been set, iRebal identifies eligible losses in taxable accounts, and shows you the securities that fit the criteria that you have defined.

Better connect with your clients through our upgraded client portal

1:30PM–2:20PM

Rob Petek, Senior Product Manager, Technology Solutions, TD Ameritrade Institutional

1 IMCA CE Credit

We didn't just redesign AdvisorClient.com. We've rebuilt it from scratch! The new design is clean, focused, and user-friendly with a streamlined home page built around what clients have said is most important to them. Attend this session for a demonstration of the new platform and get a glimpse into what the future holds for AdvisorClient.com.

Afternoon workshop: Make Veo One work(flow) for you

1:30PM–4:30PM

Stephanie Macon, Technology Consultant, TD Ameritrade Institutional

Greg Jackson, Technology Consultant, TD Ameritrade Institutional

3 IMCA CE Credits

Discover the ins and outs of Veo One. We'll show you ideas on how to efficiently manage your workflows, including: opening accounts, submitting paperwork and monitoring its status, processing cash management requests, and reviewing analytics to help you keep your firm on track. You'll also find ideas on how to get the most out of the experience if you are considering leveraging third-party integrations with CRM, financial planning, and portfolio management applications. Finally, we'll discuss documenting processes for increased efficiency and help you define or refine your firm's unique workflows.

Afternoon workshop: Outsourcing your wealth management

1:30PM–4:30PM

Danielle Fava, Director, Innovation, TD Ameritrade Institutional

Michael Gallagher, Director, Institutional Trading & Block Desk, TD Ameritrade Institutional

Julia Penn, Managed Account Consultant, TD Ameritrade Institutional

3.5 CFP CE Credits
3 IMCA CE Credits

Stop trying to be all things to all people and start streamlining your investment management activities. How? Through outsourcing – one of the top trends in today's RIA world. Learn how you can make it happen at your firm. We'll also discuss products and services available through TD Ameritrade Institutional designed to enhance your investment processes.

Afternoon workshop: iRebal 2.0

1:30PM–4:30PM
Travis Rothlisberger, iRebal Product Manager, TD Ameritrade Institutional
3 IMCA CE Credits

Already know the basics of iRebal? Become a power user. We'll walk you through advanced features like tax loss harvesting, cash management, model management, and model blending. You'll also walk away with the knowledge to help build disciplined and repeatable portfolio implementation workflows.

Thursday, February 7

Veo One: More features, integrations, analytics, and power

10:30AM–11:20AM
Chris Valleley, Director, Technology Solutions, TD Ameritrade Institutional
Michael Madrid, Product Manager, Technology Solutions, TD Ameritrade Institutional
1 IMCA CE Credit

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Industries of change: Trends & tech innovation

10:30AM–11:20AM
Dani Fava, Director, Institutional Product Development & Strategy, TD Ameritrade Institutional
1 CFP CE Credit; 1 IMCA CE Credit

We're witnessing significant change in almost every industry, from the medical field to pizza delivery. How will our behaviors change? How will our businesses change? Hear about some of the most explosive tech discoveries and trends budding in the world and how they might impact financial services - from our communications and advertising to the client experience and beyond.

iRebal user roundtables

1:00PM–1:50 PM
Jason Kurpjuweit, Senior Product Manager, iRebal, TD Ameritrade Institutional
Chris Stryker, Product Manager, iRebal, TD Ameritrade Institutional
1 IMCA CE Credit

Did you know that iRebal is the most widely adopted rebalancing platform and has the highest user rating in its category? Learn why as this session kicks off with a panel of iRebal power users. Hear about their best practices and how they get the most out of this efficient system. Following the panel, our team of iRebal product experts will guide a highly interactive discussion on iRebal features and functionality, and will also address any questions you may have about the platform.

*2018 T3 / Advisor Perspectives / Inside Information Software Survey

Improve your firm's marketing in the digital age

1:00PM–1:50PM

Michael Byrnes, President, Byrnes Consulting, LLC

1 IMCA CE Credit

Ever feel like you could be more successful when it comes to marketing, particularly when it comes online marketing? The new business landscape has changed, and digital marketing tactics are increasingly important for interacting with current clients and prospects. So come find out what works, and what doesn't. Join this session to get advanced online marketing strategies. The advice will go beyond the basics and provide recommendations that can become the foundation for pursuing your business goals online in 2019 and beyond.

Friday, February 8

Advanced technology: What's next in fintech?

9:50AM–10:40AM

Justin Webster, Director of Advanced Technology, TD Ameritrade

Nathan Hogge, Experience Design Lead, TD Ameritrade

1 CFP CE Credit; 1 IMCA CE Credit

We all know technology advances at an exponential pace. Our team of Advanced Technology experts aims to help the RIA industry keep up with tech advances so your firm can prepare for the next generation of investors. Artificial Intelligence, robotics, AR, and VR are just a few the topics we'll touch on in this jam-packed session. Join us for a discussion on the not-so-distant future of fintech and how it may help your firm stay relevant in a rapidly expanding technological environment.

The best tech decisions other advisors ever made

11:00AM–11:50AM

Craig Uhlenkott

1 CFP CE Credit; 1 IMCA CE Credit

Making decisions about which technology you use can be tough. Sometimes the choices we make are good enough to get the job done. And other times our choices allow for significant gains in efficiency and productivity. We've gathered three of your peers to discuss the best tech decisions they've ever made, what went into helping make those choices, and what benefits they've experienced since implementation.

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