



8TH ANNUAL

Wealth and Asset Management Conference

WEDNESDAY, MAY 1, VIRTUAL—VIA ZOOM (all times are CT)

9:00 AM	Kick-off with Olin leadership	<i>Special thanks to Rich Ryffel</i> CONFERENCE COCHAIRS Anne Elliot , CFP®, Senior Wealth Strategist - Wealth Management Consultation, Edward Jones Ed Edwin , Industry Consultant Professor Timothy Solberg , WashU Olin Center for Finance & Accounting Research
9:10 AM	Trends in Wealth Management	Kevin Keller , CAE, CEO, CFP Board Moderator: Jeff Levine , CPA/PFS, CFP®, Chief Planning Officer, Buckingham Strategic Wealth
10:00 AM	Author Talks	John Jennings , JD, President and Chief Strategist, St. Louis Trust & Family Office John Horn , Professor of Practice in Economics, Washington University, Olin Business School Michael Pompian , CFA®, CFP®, Founder and Chief Investment Officer, Sunpointe Investments Moderator: Professor Timothy Solberg , WashU Olin Center for Finance & Accounting Research
10:45 AM	BREAK	
11:00 AM	Women Leaders in Finance	Lisa Peel , Principal, Edward Jones Julie Lilly , JD, CEO, St. Louis Trust Company Wendy Hartman , CFP®, President, Buckingham Strategic Wealth Patty Dahl , MBA, Chief Financial Officer, Confluence Investment Management Jana Gregorek , CLU®, ChFC®, MBA, Director of Talent Acquisition, Moneta
12:00 PM	LUNCH BREAK	
12:30 PM	Women Leaders in Finance Lunch	Maddy Dychtwald , Cofounder, Age Wave
1:20 PM	BREAK	
1:30 PM	Presidential Puzzle at the Firm Level	Kateryna Holland , Assistant Professor of Finance, University of Missouri, Trulaske College of Business Rich Ryffel , Executive Director of Business Leadership and Professor of Practice, Purdue University, Daniels School of Business
2:15 PM	The Great Wealth Transfer Starts with the Great Wealth Talk	Lena Haas , Principal, Head of Wealth Management Advice & Solutions, Edward Jones Annie Elliott , CFP®, Senior Wealth Strategist - Wealth Management Consultation, Edward Jones
3:00 PM	BREAK	
3:15 PM	Leadership in Wealth & Asset Management	David Eichhorn , CFA®, CEO, NISA Investment Advisors Don Cobin , CFA®, President and CEO, Kennedy Capital Management Kathy Lintz , CFP®, Partner and Founder, Matter Family Office Rajini Kodialam , Founder and Co-CEO, E-3 Tech Moderator: Jack Dwyer , President, Sunpointe Investments
4:15 PM	Day 1 Closing Remarks	Ed Edwin , Industry Consultant

THURSDAY, MAY 2, VIRTUAL—VIA ZOOM (all times are CT)

8:00 AM	Keynote on AI and Wealth Management	Penny Pennington , Managing Partner, Edward Jones
8:30 AM	Digital Evolution in Wealth Management	PANEL Nicole Carignan , VP of Strategic Cyber AI, Darktrace Nagesh Ravikanti , Managing Director and Head of Wealth Management Technology, Bank of America Dr. Sindhu Joseph , Founder and CEO, CogniCor Moderator: Atul Kamra , Managing Partner, SixThirty Ventures
9:30 AM	“What Keeps Institutional Investors Up at Night?: Global Market Strategy”	Dean Mike Mazzeo , Washington University, Olin Business School Aoifinn Devitt , CFP®, Chair of Investment Committee and Chief Global Market Strategist, Moneta
10:00 AM	BREAK	
10:15 AM	Macro & Market Update: How to Think About Portfolios in the Year of the Fed Pivot	Mona Mahajan , Principal, Senior Strategist, Edward Jones David Kelly , Chief Global Strategist, JP Morgan Asset Management
11:00 AM	Delivering Alpha - The Value of Professional Advice	PIMCO CE (1hr; CFP®, CIMA, CPWA, RMA, CPA) John Nersesian , CFP®, CIMA, CPWA, CIS, Head of Advisor Education, PIMCO
12:00 PM	Day 2 Closing Remarks	Annie Elliott , CFP®, Senior Wealth Strategist - Wealth Management Consultation, Edward Jones