



DeVoe Elevate – Agenda

May 18-19, 2022 | Wynn Las Vegas

Tuesday, May 17	Arrivals
5:30 pm	Welcome Reception Located on-site at the Wynn in the Eastside Lounge
Wednesday, May 18	Human Capital
7:45 am – 9:00 am	Registration Networking Breakfast Exhibit Lounge One-on-One Meetings with Experts
9:00 am – 9:30 am	Opening Address: Talent and Your Firm’s Future David DeVoe, Founder and CEO, DeVoe & Company
9:35 am – 10:30 am	Keynote Address: The Importance of Talent Management in Unlocking Business Performance Martine Lellis, Chief Talent and Administrative Officer, Mercer Advisors
10:30 am – 11:00 am	Networking Break in the Exhibit Lounge
11:00 am – 12:00 pm	Engagement and Retention Best Practices: Learn from the <i>Best Places to Work</i> Matthew Adams, CEO and Managing Partner, Mission Wealth Greg Friedman, Chief Strategy Officer, Wealthspire Advisors DeLynn Zell, Founder and CEO, Bridgeworth Wealth Management <i>Moderator: Lisa Crafford, Director Head of Business Consulting, BNY Mellon Pershing</i>
12:00 pm – 1:00 pm	Lunch and Networking in the Exhibit Lounge
1:00 pm – 1:30 pm	Solving the Compensation Challenge Doug Johnson, Managing Director, DeVoe & Company
1:30 pm – 2:25 pm	Tales from the Field: Compensation Design to Drive Your Business Objectives Carol Benz, Partner & Chief People Officer, Cerity Partners Colin Higgins, Chief Executive Officer, Summitry James Horrocks, Chief Executive Officer, TimeScale Financial <i>Moderator: Tim Kochis, Special Advisor, DeVoe & Company</i>
2:25 pm – 3:05 pm	Networking Break in the Exhibit Lounge
3:05 pm – 4:00 pm	The G2 Financing Equation Kirsten Petras, Executive Director, Oak Street Funding Dustin Mangone, Managing Partner, Director of Investment Advisor Program, PPC LOAN James Hughes, SVP, Head of Investment Advisory Lending, Live Oak Bank <i>Moderator: Brad Grubb, Managing Director, DeVoe & Company</i>
4:00 pm – 5:30 pm	Networking Reception – “Around the World” Wine Tasting



DeVoe Elevate – Agenda
May 18-19, 2022 | Wynn Las Vegas

Thursday, May 19	Growth
7:45 am – 9:00 am	Networking Breakfast Exhibit Lounge One-on-One Meetings with Experts
9:00 am – 9:45 am	Opening Address: The Growth Equation David DeVoe, Founder and CEO, DeVoe & Company
9:45 am – 10:25 am	Creating the Foundation to Be Referable Ryan Parker, President, EP Wealth Advisors Ed Moore, Special Advisor, DeVoe & Company
10:25 am – 10:55 am	Networking Break in the Exhibit Lounge
10:55 am – 11:35 am	COI Referral Sources: The Power of Professional Relationships Ken Haman, Managing Director, AllianceBernstein's Advisor Institute
11:35 am – 11:50 am	Maximizing Performance Across the Growth Lifecycle David DeVoe, Founder and CEO, DeVoe & Company
11:50 am – 1:00 pm	Lunch and Networking in the Exhibit Lounge
1:00 pm – 1:45 pm	Keynote Address: The Evolving RIA Business Model David Canter, EVP, Head of RIA and Family Office Segments, Fidelity Investments <i>In a Fireside Chat with David DeVoe</i>
1:45 pm – 2:40 pm	Secrets of High Growth Firms Frank Bub, Head of Wealth Management Consulting, CAPTRUST Bill Keen, Founder and CEO, Keen Wealth Advisors Kay Lynn Mayhue, President, Merit Financial <i>Moderator: Tony Parkin, Vice President, Business Consulting, Schwab Advisor Services</i>
2:40 pm – 3:00 pm	Networking Break in the Exhibit Lounge
3:00 pm – 4:00 pm	Beyond Referrals: Developing Your Sources of Growth Joe Anthony, President, Gregory FCA Diana Cabrices, VP, Enterprise Development, Snappy Kraken Jason Early, President, BizEquity <i>Moderator: Brian Hamburger, Founder, President and CEO, MarketCounsel / HamburgerLaw</i>
Closing Comments	

Important Notes

- Sessions and meals will take place in the Latour Ballrooms in the Wynn Las Vegas
- Sessions and times are subject to change.