

**Tracks for V.I.S.I.O.N. Regular**

**| AAAA 2023 V.I.S.I.O.N. Conference Theme: Navigating The Future of Wealth Management For Black America. |**  
**| Sub Theme: "Connect with Your Community and Thrive at V.I.S.I.O.N." |**

- 1 Next Gen/Career Changers
- 2 Operations & Administrative Professionals
- 3 Sales Managers
- 4 DEI Leaders
- 5 RIA/Independent FA's
- 6 Bank brokerage/Wire house FA's
- 7 CEO's and Strategic Partners



**Wednesday Date: September 13th 2023**

Time EST	Session Topics	MEETING ROOM
6:30 AM - 7:30 AM	Morning Exercise Groups	<b>Captain:</b>
10:00 AM - 5:00 PM	Conference & Career Symposium Registration	Woodrow Wilson Registration Desk (2)
11:00 AM - 12:00 PM	Breakout Sessions #1- Wealth Management Unveiled: Breaking into the Field and Starting Your Journey After Graduation. (Next Gen. Talent)	National Harbor 2
11:00 AM - 12:00 PM	Breakout Sessions #2 - Career Insights: Making the switch; Advice from successful career changers in wealth management. (Career Changers)	National Harbor 3
12:00 PM - 1:00 PM	Lunch	TBD
1:00 PM - 1:15 PM	Networking Break	Woodrow Wilson Lobby
1:15 PM - 2:15 PM	Breakout Sessions #3 - Wealth Management Unveiled: Breaking into the Field and Starting Your Journey After Graduation. (Next Gen. Talent)	National Harbor 2
1:15 PM - 2:15 PM	Breakout Sessions #4 - Crafting Your Brand: The Power of Personal Branding for New Wealth Management Professionals. (Career Changers)	National Harbor 3
2:15 PM - 2:30 PM	Networking Break	Woodrow Wilson Lobby
2:30 PM - 3:25 PM	Fireside Chat - Different Career paths available in Wealth Management.	Woodrow Wilson ABCD
3:00 PM - 11:59 PM	Hotel Check in	
3:30 PM - 6:00 PM	Career Fair - #Career Changers & #Next Gen Talent	Woodrow Wilson ABCD
5:00 PM - 6:00 PM	Track Collaboration Sessions	Woodrow Wilson Lobby
5:45 PM - 6:30 PM	Welcome Reception : Meet and Greet	Woodrow Wilson Lobby
6:30 PM - 8:30 PM	Dine Around Town with a Corporate Member of AAAA	Local Establishments
6:30 PM - 8:00 PM	VIP Networking Reception and Dinner - Invitation Only	Woodrow Wilson ABCD

**Thursday Date: September 14th 2023**

Time EST	Session Topics	MEETING ROOM
6:30 AM - 7:30 AM	Morning Exercise Groups	<b>Captain:</b>
8:00 AM - 4:30 PM	Conference Registration	Woodrow Wilson Registration Desk (2)
7:30 AM - 8:30 AM	Breakfast	Cherry Blossom Ballroom
<b>8:35 AM - 9:00 AM</b>	<b>General Session - #1 : Welcome/Conference Opening Remarks - AAAA Chairman, Founder and Incoming Chair Emeritus.</b>	<b>Woodrow Wilson ABCD</b>
<b>9:00 AM - 10:00 AM</b>	<b>General Session #2: J.P. Morgan Wealth Management</b>	<b>Woodrow Wilson ABCD</b>
10:00 AM - 10:15 AM	Break	Woodrow Wilson Lobby
10:15 AM - 11:05 AM	Breakout Sessions #1 - Technology: Stay Ahead of the Curve: Compliance in the Digital Age. (Compliance and Administrative Professionals) [C.E. Eligible]	Baltimore 1
10:15 AM - 11:05 AM	Breakout Sessions #1 - Practice Management: Mastering the Art of Sales Leadership in Wealth Management. (Sales Managers) [C.E. Eligible]	Baltimore 2
10:15 AM - 11:05 AM	Breakout Sessions #1 - Advocacy: Promoting Diversity, Equity, and Inclusion in Wealth Management. (DEI Leaders) [C.E. Eligible]	Baltimore 3
10:15 AM - 11:05 AM	Breakout Sessions #1 - Navigating Leadership Challenges in a Rapidly Evolving Industry (VIP's and CEO's)	Woodrow Wilson ABCD
10:15 AM - 11:05 AM	Breakout Sessions #1 - Succession Planning :Importance of succession planning in preserving family wealth. (Wire house FAs / Bank brokerage FAs) [C.E. Eligible]	Baltimore 4
10:15 AM - 11:05 AM	Breakout Sessions #1 - Driving Growth: Proven Strategies for RIAs & Independent Financial Planners and Financial Advisors. (RIAs / Independent FA's) [C.E. Eligible]	Baltimore 5
11:05 AM - 11:25 AM	Networking: Coffee and Connect/Break	Woodrow Wilson Lobby
11:30 AM - 12:20 PM	Breakout Sessions #2 - Streamlining Compliance & Administrative Processes: Innovations in Client Servicing Techniques. (Compliance and Administrative Professionals) [C.E. Eligible]	Annapolis 1

11:30 AM - 12:20 PM	Breakout Sessions #2 - Recruiting: How to Build and Lead High-Performing Sales Teams in the Wealth Management Industry. (Sales Managers) [C.E. Eligible]	Annapolis 2
11:30 AM - 12:20 PM	Breakout Sessions #2 - Advocacy: Dismantling Barriers. Creating Inclusive Financial Services Industry for the B/AA Professional. (DEI Leaders) [C.E. Eligible]	Annapolis 3
11:30 AM - 12:20 PM	Breakout Sessions #2 - Practice Management: The Evolving Role of the Financial Advisor. (Wire house FAs / Bank brokerage FAs) [C.E. Eligible]	Annapolis 4
11:30 AM - 12:20 PM	Breakout Sessions #2 - Compliance: Navigating the Complexities of Today's Regulatory Landscape for RIAs and Independents. (RIAs / Independent FA's) [C.E. Eligible]	Baltimore 1
11:30 AM - 12:20 PM	Breakout Sessions #2 - Navigating Leadership Challenges in a Rapidly Evolving Industry (VIP's and CEO Roundtable Discussion on Best Practices Invitation Only)	Woodrow Wilson ABCD
12:20 PM - 12:30 PM	Break	Woodrow Wilson Lobby
<b>12:30 PM - 1:30 PM</b>	<b>Lunch General Session #3: Panel Discussion: Unleashing Brilliance: Elevating Black Women in Global Finance and Wealth Management [C.E. Eligible]</b>	<b>Cherry Blossom Ballroom</b>
1:45 PM - 2:35 PM	Breakout Sessions #3 - Recruiting: The importance of personal/professional branding in attracting and retaining new recruits. (Sales Managers) [C.E. Eligible]	Baltimore 2
1:45 PM - 2:35 PM	Breakout Sessions #3 - Advocacy: The role of Emotional Intelligence in ethical decision-making in the wealth management industry. (DEI Leaders) [C.E. Eligible]	Baltimore 3
1:45 PM - 2:35 PM	Breakout Sessions #3 - Practice Management: Best practices for managing a successful wealth management firm. (Wirehouse FAs / Bank brokerage FAs) [C.E. Eligible]	Baltimore 4
1:45 PM - 2:35 PM	Breakout Sessions #3 - Branding: Building a strong brand for your wealth management firm. (RIAs / Independent FA's) [C.E. Eligible]	Baltimore 5
1:45 PM - 2:35 PM	Breakout Sessions #3 - Mental Health: Supporting mental health for productivity and wellbeing in wealth management firms. (Compliance and Administrative Professionals)	Annapolis 1
2:35 PM - 3:00 PM	Networking: Track Collaboration Sessions	Woodrow Wilson Lobby
<b>3:05 PM - 4:35 PM</b>	<b>General Session #4: Presidents' of Wealth Roundtable Discussion - Invitation Only</b>	<b>Woodrow Wilson ABCD</b>
4:35 PM - 6:00 PM	Networking: Take Collaboration Session	Woodrow Wilson Lobby
6:35 PM - 7:00 PM	Pre Gala And Awards Networking Reception.	Woodrow Wilson ABCD
7:00 PM - 10:00 PM	Celebrating Excellence: AAAA Gala and Awards Night	Cherry Blossom Ballroom

**Friday Date: September 15th 2023**

		MEETING ROOM
6:30 AM - 7:30 AM	Morning Exercise Group	<b>Captain:</b>
7:30 AM - 8:30 AM	Breakfast	Annapolis 1+2
<b>8:35 AM - 9:00 AM</b>	<b>General Session #1 - Advocacy: The Financial Literacy Gap. How B/AA Financial Professionals Can Make a Difference by Promoting Financial Wellness in the B/AA Community.</b>	<b>Annapolis 3+4</b>
<b>9:00 AM - 10:00 AM</b>	<b>General Session #2 - Practice Management: A session on Leadership with Guest Speaker* [C.E. Eligible]</b>	<b>Woodrow Wilson ABCD</b>
10:00 AM - 10:15 AM	Break	Woodrow Wilson Lobby
<b>10:15 AM - 11:05 AM</b>	<b>General Session #3 - Merrill Lynch</b>	<b>Woodrow Wilson ABCD</b>
11:05 AM - 11:25 AM	Break	Woodrow Wilson Lobby
<b>11:30 AM - 12:20 PM</b>	<b>General Session #4 - Technology: Protecting Client Data. Cyber security best practices for the Wealth Management Industry. [C.E. Eligible]</b>	<b>Annapolis 1+2+3+4</b>
12:30 PM - 1:30 PM	Lunch: General Session #5 - Recognizing AAAA's TOP 50 U 50 Financial Professionals in Wealth Management.	Woodrow Wilson ABCD
1:30 PM - 1:45 PM	Break	Woodrow Wilson Lobby
1:45 PM - 2:35 PM	Breakout Sessions #4 - Technology: Implementing AI to improve risk profiling and investment strategies in wealth management. (Compliance and Administrative Professionals) [C.E. Eligible]	Baltimore 1
1:45 PM - 2:35 PM	Breakout Sessions #4 - Advocacy: Best practices for building a diverse and inclusive leadership team in wealth management. (DEI Leaders) [C.E. Eligible]	Baltimore 2
1:45 PM - 2:35 PM	Breakout Sessions #4 - Mental Health: Supporting mental health for productivity and wellbeing in sales and service teams. (Sales Managers) [C.E. Eligible]	Baltimore 3
1:45 PM - 2:35 PM	Breakout Sessions #4 - Practice Management : Tailoring financial plans for the unique needs of athletes. (Wire house FAs / Bank brokerage FAs) [C.E. Eligible]	Baltimore 4
1:45 PM - 2:35 PM	Breakout Sessions #4 - Practice Management : Tailoring financial plans for the unique needs of athletes. (RIAs / Independent FA's) [C.E. Eligible]	Baltimore 5
2:35 PM - 3:00 PM	Networking: Track Collaboration Session	Woodrow Wilson Lobby
<b>3:05 PM - 4:35 PM</b>	<b>General Session #5 - General Session Advocacy: State of B/AA Wealth in the U.S. (AAAA Strategic Partners AAAA, FSI, AWD, FPA, NASP, NBA, ABEPP)</b>	<b>Woodrow Wilson ABCD</b>
<b>4:45 PM - 5:30 PM</b>	<b>General Session #6 - Town Hall Discussion on The Future of AAAA</b>	<b>Woodrow Wilson ABCD</b>
5:30 PM - 6:30 PM	Networking Reception/Free Time.	Woodrow Wilson Lobby
7:30 PM - 11:59 PM	Harmony in Motion: AAAA's Multicultural Dance Extravaganza Sponsored by AAAA; Three dance floors playing a wide selection of cultural music.	[Roof Top floor] + [Annapolis 1+2+3+4] + [F