



**Schedule for the 2016 Technology Tools for Today T3 Conference (Subject to Change)**

**February 9, 2016 - Tuesday Tech. Labs**

Date	Time	Key West (A)	Palm Beach (A)	Clearwater (A)	Orlando	Jacksonville (A)	Tallahassee (A)	Tallahassee (B)
Tuesday	1:00pm to 5:00pm	eMoney Advisor	Fidelity Investments	Junxure	Orion Advisor Services	MoneyGuidePro	Morningstar	Laserfiche
Date	Time	Key West (B)	Palm Beach (B)	Clearwater (B)	Jacksonville (B)			
Tuesday	1:00pm to 5:00pm	Redtail Technology	Vanare/Nest Egg	Riskalyze	Oranj			
Tuesday	6:00pm to 7:00pm	<b>Creating a Tech Spending / Training Plan for your Financial Services Firm</b> — A special pre-conference session led by Matt Lynch and the Strategy & Resources, LLC consulting team.						

**February 10, 2016 - Wednesday Conference Sessions**

Date	Time	Ocean Ballroom (II/IV)	Ocean Ballroom I
Wednesday	7:15am to 8:00am	Continental Breakfast - Ocean Ballroom Foyer	
Wednesday	8:00am to 8:10am	Conference Welcome	
Wednesday	8:10am to 8:50am	<b>General Session:</b> Cut the Complexity: How an Open Ecosystem Leads to Elegant Simplicity - Tricia Rothschild, Morningstar, Inc.	
Wednesday	8:55am to 9:35am	<b>General Session:</b> It's Wealth-Planning Beyond the Numbers - Drew DiMarino, eMoney Advisor	
Wednesday	9:35am to 10:05am	Refreshment Break - Ocean Ballroom Foyer	
Wednesday	10:10am to 10:50am	<b>General Session:</b> The Wake-up Call - Bob Curtis, CEO of PIEtech, Inc. , and Kevin Knull, President of PIEtech, Inc.	
Wednesday	10:55am to 11:35am	<b>General Session:</b> Oranj - Advisor+ Platform - Greg Sauer, VP, Business Development, Oranj	
Wednesday	11:40am to 12:20pm	<b>General Session:</b> It's Time to "Check-in" - Aaron Klein - CEO/Riskalyze	
Wednesday	12:30pm to 1:30pm	Lunch Break - Ocean View Terrace	
Wednesday	1:35pm to 2:15pm	<b>General Session:</b> Is Your Technology Future-Ready? - Ed O'Brien, Head of Platform Technology, Fidelity Investments	
Wednesday	2:20pm to 3:00pm	<b>Fireside Chat with Paul West (moderated by Joel Bruckenstein)</b>	<b>Super Session Breakout:</b> Creating and Implementing an Impactful Digital Strategy with Advicent - Phil Cunningham, CEO, Advicent Solutions
Wednesday	3:00pm to 3:55pm	Refreshment Break - Ocean Ballroom Foyer	
Wednesday	4:00pm to 4:40pm	<b>Super Session Breakout:</b> Financial Planning Practitioner Panel - Hosted by Joel Bruckenstein	<b>Super Session Breakout:</b> Achieving Scale Through Technology - Andrew Town, TD Ameritrade
Wednesday	6:00pm to 8:00pm	Cocktail Reception in Exhibit Hall (Grand Ballroom)	

**February 11, 2016 - Thursday Conference Sessions**

Date	Time	Ocean Ballroom (II/IV)	Ocean Ballroom (I/III)	Caribbean Salon I-IV	Caribbean Salon V-VIII
Thursday	7:15am to 8:00am	<b>Breakfast in Exhibit Hall (Grand Ballroom)</b>			
Thursday	8:05am to 8:15am	<b>Conference Welcome</b>			
Thursday	8:15am to 8:55am	<b>General Session:</b> The Future of Wealth Management Technology – “What got you here won’t get you there” - GREG FRIEDMAN, MS, CFP, founder and president of Junxure			
Thursday	9:00am to 9:40am	<b>General Session:</b> Deploy the Best of Robo Technology to Delight Clients through ECM - Chad Christensen, Partner and Chief Compliance Officer of Semper Augustus Investments Group LLC - Laserfiche			
Thursday	9:45am to 10:25am	<b>General Session:</b> Twisted Business — Lessons Learned as a Musician, Band Manager and Entrepreneur - Jay Jay French			
Thursday	10:25am to 11:15am	<b>Break with Sponsors in Exhibit Hall (Grand Ballroom)</b>			
Thursday	11:15am to 11:45am	<b>Breakout Session:</b> Who is complying with the GIPS standards and why are they doing it? - John Norwood Consulting	<b>Breakout Session:</b> Engaging End Users in the Design of Digital Experiences - Chris Paul, Senior Vice President for Advisor & Design, Business Technology Services, LPL Financial	<b>Breakout Session:</b> Talk Data to Me: Navigating the ones and zeros of business intelligence - Eddie Sempek, Orion Advisor Services, LLC	<b>Breakout Session:</b> Relief Coming Your Way - The Rise of the Wealth Platform - Bob Conchiglia, Vice President, Advisory Sales, SS&C Advent
Thursday	11:45am to 12:15pm	<b>Breakout Session:</b> How to become a prized financial planning recruit - JD Bruce, President, Abacus Wealth Partners	<b>Breakout Session:</b> Fees at a Crossroads: Adopting an advisory fee model that reflects your true value - Raef Lee, Managing Director and Head of New Services and Strategic Partnerships, SEI Advisor Network	<b>Breakout Session:</b> Department of Labor Regulations Regarding Fiduciary Liability - Kevin Miller, President/CEO, The E-Valuator, LLC	<b>Breakout Session:</b> DocuSign
Thursday	12:15pm to 2:00pm	<b>Lunch in Exhibit Hall (Grand Ballroom)</b>			
Thursday	2:00pm to 2:40pm	<b>General Session:</b> Value Proposition Workshop Ed Saxon, Academy Award-Winning Producer			
Thursday	2:45pm to 3:25pm	<b>General Session:</b> After Roboadvisors: A Millennial Perspective on Future-Technology That Will Fuel Wealth Management Hypergrowth - Lex Sokolin, COO of wealth management platform Vanare   NestEgg, and founder of roboadvisor NestEgg Wealth			
Thursday	3:25pm to 3:50pm	<b>Break with Sponsors in Exhibit Hall (Grand Ballroom)</b>			
Thursday	3:55pm to 4:25pm	<b>Breakout Session:</b> Financial Technology Yesterday, Today, Tomorrow - Michael Wilson, Philip Wilson, AdvisoryWorld - Ed Butowsky, Chapwood Investments - Dean Cook, FTJ FundChoice	<b>Breakout Session:</b> Options for Leveraging Robo-Technology Within Your Firm: The Nuts & Bolts of How to Successfully and Profitably Bring an Automated Investment Service Platform Online - Deborah Fox, CEO and Founder, Fox Financial Planning Network (12 Min.) 3:55pm - 4:10pm <b>Breakout Session:</b> Workflows and Automations as a Form of (Managerial) Liberation - Mario Canas, Redtail Technology (12 Min.) 4:10pm - 4:25pm	<b>Breakout Session:</b> Making Rebalancing Software Core to Your Business - Janson Evans, VP of Sales and Bus. Development, TradeWarrior, Inc. (12 Min.) 3:55pm - 4:10pm <b>Breakout Session:</b> Billing Innovation for RIAs - Seth Johnson, Co-Founder and CEO, Redi2 Technologies, Inc. (12 Min.) 4:10pm - 4:25pm	<b>Breakout Session:</b> Wealth Access: PFM for Advisors - David Benskin, Founder/CEO, Wealth Access, Inc. (12 Min.) 3:55pm - 4:10pm <b>Breakout Session:</b> The next generation of online client engagement - Brandon Rembe, Envestnet   Tamarac (12 Min.) 4:10pm - 4:25pm

Thursday	4:30pm to 5:00pm	<b>Breakout Session:</b> Cybersecurity Efforts Falling Short at Your Firm? - Sam Attias Managing Director, External IT	<b>Breakout Session:</b> The "Non-Millennial Millennial" and Adding Value in A Digital World - Greg Vigrass, President, Folio Institutional (12 Min.) 4:30pm - 4:45pm <b>Breakout Session:</b> E-signatures & E-forms - Robert Powell, VP of Sales & Mktg., Laser App (12 Min.) 4:45pm - 5:00pm	<b>Breakout Session:</b> How I streamlined my practice and increased efficiency with Advyzon - Mitchell F. Keil, Advyzon (12 Min.) 4:30pm - 4:45pm <b>Breakout Session:</b> Charles River Wealth Management Solution - Doug Settelmeyer, Sales Manager, Charles River Development (12 Min.) 4:45pm - 5:00pm	<b>Breakout Session:</b> Billing In Panoramax - Chris Hasting and James Formanck, Sapphire Software Services (12 Min.) 4:30pm - 4:45pm <b>Breakout Session:</b> Streamlining Client Communications: Keeping it Simple, Efficient & Compliant - Maree Moscati, CEO, Copytalk, LLC (12 Min.) 4:45pm - 5:00pm
Thursday	5:00pm to 5:30pm	<b>Breakout Session:</b> The Interactive Website of the Future: The Pre-Engagement Engagement -Bob Veres	<b>Breakout Session:</b> Total Wealth Insights - Doug Wolford, Private Client Resources		
Thursday	6:00pm to 9:00pm	<b>FinTech Beach Party: Hosted by Advicent, Redtail, Laser App, Morningstar, Riskalyze and SS&amp;C Advent</b>			

### February 12, 2016 - Friday Conference Sessions

Date	Time	Ocean Ballroom (II/IV)	Ocean Ballroom (I/III)	Caribbean Salon I-IV	Caribbean Salon V-VIII	
Friday	7:30am to 8:30am	<b>Breakfast in Exhibit Hall (Grand Ballroom)</b>				
Friday	8:30am to 9:00am	<b>Breakout Session:</b> Optimizing processes in the cloud or on mobile devices - Genesis Brown + Paul Fredrick, OnBase by Hyland (12 Min.) 8:30am - 8:45am <b>Breakout Session:</b> The e-Enabled Advisor: Top 5 Trends Shaping the Next Era of Advisor Technology - Dave Welling, Senior Vice President and Managing Director, Advisory - SS&C Advent (12 Min.) 8:45am - 9:00am	<b>Breakout Session:</b> Leveraging Technology to Address SEC Cybersecurity Guidelines - Robert Madi, Partnership Development Executive, Itegria, LLC (12 Min.)8:30am - 8:45am <b>Breakout Session:</b> Leverage an efficient, systematic and scalable proposal process to grow your business - Jonathan Georges, EquiSoft (12 Min.)8:45am - 9:00am	<b>Breakout Session:</b> Investment Adviser Advertising: Rules and Process Enhancement - David Leimgruber, National Regulatory Services (12 Min.)8:30am - 8:45am <b>Breakout Session:</b> fi360: The Training and Tools needed in an evolving Fiduciary Landscape - Travis Reeder, Relationship Manager, fi360 (12 Min.) 8:45am - 9:00am	<b>Breakout Session:</b> Your CRM – How One Technology Can Help Advisors Run a Great Business and Take Great Care of Clients! - George Taylor - CEO/Temenos Advisory (12 Min.) 8:30am - 8:45am <b>Breakout Session:</b> Put digital advice and financial planning to work for your firm - Oleg Tishkevich, Finance Logix (12 Min.) 8:45am - 9:00am	
Friday	9:00am to 9:30am	<b>Breakout Session:</b> Engaging the Next Generation through Technology-A Millennial Perspective - Barry Mullaholland, Texas Tech University - Qianwen (Rache) Bi, Utah Valley University - Jacob Rich, Utah Valley University	<b>Breakout Session:</b> Effectively Mapping Portfolios to Client's Needs Pays Big Dividends - Paul Resnik, Co-Founder, FinaMetrica (12 Min.) 9:00am - 9:15am <b>Breakout Session:</b> What does your brand say about you? - Steeve Pratte, Business Analyst, Croesus Solutions Inc. (12 Min.)9:15am - 9:30am	<b>Breakout Session:</b> Digital signatures meets document management, best practices for processing & archiving with DocuSign and eSignx. - Patrick Welsh and Morgan Wheeler, Cities Digital (12 Min.) 9:00am - 9:15am <b>Breakout Session:</b> Secrets of Salesforce - Mary Ferguson, Concenter Services - XLR8 (12 Min.) 9:15am - 9:30am	<b>Breakout Session:</b> Cyber-security and the Hidden Dangers of Integration - Aaron Spradlin (12 Min.) 9:00am - 9:15am <b>Breakout Session:</b> Using dashboards to create a self-managing team - JD Bruce, President, Abacus Wealth Partners (12 Min.) 9:15am - 9:30am	
Friday	9:40am to 10:10am	<b>Breakout Session:</b> eAdvisors Take the Lead - Shannon Porro, Fidelity Investments (12 Min.) 9:40am - 9:55am <b>Breakout Session:</b> The Evolution of Client Portfolio Reporting - Rob Major, AssetBook (12 Min.) 9:55am - 10:10am	<b>Breakout Session:</b> The Death of Held-Away Accounts - Niko Karvounis, Chief Strategy Officer, Quovo (12 Min.) 9:40am - 9:55am <b>Breakout Session:</b> Taking Voice to the Cloud - Tim Colman, Business Development Manager, Jive Communications (12 Min.) 9:55am - 10:10am	<b>Breakout Session:</b> RightCapital's Innovative financial planning solution - Shuang Chen, Co-Founder and CEO, RightCapital (12 Min.)9:40am - 9:55am <b>Breakout Session:</b> True Business Process Automation without all the Kicking and Screaming - Gabriel Cooper, Director of Business Development, Advisors Assistant (12 Min.)9:55am - 10:10am	<b>Breakout Session:</b> Improving productivity and client experience: Inside the InvestmentNews Adviser Technology Study - InvestmentNews	
Friday	10:10am to 10:40am	<b>Breakout Session:</b> Clients, Clients, Clients: Meeting the technology expectations of clients today and tomorrow, Edwin Choi, Co-Fouder and CEO, Capitect (12 Min.) 10:10am - 10:25am <b>Breakout Session:</b> Consolidated Reporting: Top 10 Reports Every Wealthy Family Needs - Rulonna Neilson, Executive VP, Bus. Development and Strategy, Archway Technology Partners (12 Min.) 10:25am - 10:40am	<b>Breakout Session:</b> 2016: The Year of The Enabler - Hussain Zaidi, Advizr (12 Min.) 10:10am - 10:25am <b>Breakout Session:</b> Advisor-focused technology solutions: what you need to know in 2016 - Kevin Cimring, CEO, Jenstep, Inc.(12 Min.) 10:25am - 10:40am	<b>Breakout Session:</b> Turning Data into Actionable Insights - Shawn Rodgers, Pershing, a BNY Mellon Company (12 Min.) 10:10am - 10:25am <b>Breakout Session:</b> What's Next? After the Digital Revolution of Finance - John Stuart, CMO, Invest Cloud (12 Min.) 10:25am - 10:40am	<b>Breakout Session:</b> Big Data Prospecting - John Hallinan, Director of Business Development, BizEquity (12 Min.) 10:10am - 10:25am <b>Breakout Session:</b> Unify and Simplify with SmartOffice - Bryan Eshelbrenner, Ebix Smart Office (12 Min.) 10:25am - 10:40am	

Friday	10:45am to 11:15am	<p><b>Breakout Session:</b> Scenario-based Optimization: Build Portfolio That Can Take a Hit - Praveen Ghanta, Co-Founder, HiddenLevers (12 Min.) 10:45am - 11:00am</p> <p><b>Breakout Session:</b> It's an on-demand world... is your practice ready? - Clay Thompson, Fugent (12 Min.) 11:00am - 11:15am</p>	<p><b>Breakout Session:</b> The Power of Cash: Harnessing a \$3 Trillion Asset Class - Gary E. Zimmerman, Founder &amp; CEO, MaxMyInterest (12 Min.) 10:45am - 11:00am</p> <p><b>Breakout Session:</b> A view from across the pond, adviser technology in the UK – a comparative regulatory regime - Nick Eatock and Hamish Purdey, Intelliflo (12 Min.) 11:00am - 11:15am</p>	<p><b>Breakout Session:</b> Stop Trying to Do It All: Benefits of Adopting an Integrated Wealth Management Technology and Services Platform - Nathan Berk, CEO, IAS (12 Min.) 10:45am - 11:00am</p> <p><b>Breakout Session:</b> Wealth Management Note Manager and How It can Transform Your Business - Ted Tsung, CEO/CTO, AppCrown LLC (12 Min.) 11:00am - 11:15am</p>	<p><b>Breakout Session:</b> Making the move to Office 365 - Vilas Naralakattu, Technology Manager, Pinnacle Advisory (12 Min.) 10:45am - 11:00am</p> <p><b>Breakout Session:</b> An Experienced Practitioner's Tale: Technology Decisions for My New Solo Advisory Business - Daniel Joss, Joss Financial Group, LLC (12 Min.) 11:00am - 11:15am</p>
Friday	11:15am to 11:30am	<p><b>Breakout Session:</b> The convergence of compliance and technology - Carlos Guillen + Jack O'Hara, BasisCode Compliance LLC (12 Min.) 11:15am - 11:30am</p>	<p><b>Breakout Session:</b> What It Means To Be a Digital Custodian - Tom Kimberly, Betterment (12 Min.) 11:15am - 11:30am</p>	<p><b>Breakout Session:</b> The Death of the Portfolio Accounting System - Chris Casey, WealthTechs Inc. (12 Min.) 11:15am - 11:30am</p>	<p><b>Breakout Session:</b> Tech-Aided Human Interaction in an Era of Automation and Instant Access - Matthew Kempin, Account Executive, EverPlans (12 Min.) 11:15am - 11:30am</p>
Friday	11:30am to 11:45am	<p><b>Silver Breakout Session:</b> Joel Bruckenstein (12 Min.) 11:30am - 11:45am</p>			
Friday	11:45am to 1:30pm	<b>Break and Lunch in Exhibit Hall (Grand Ballroom)</b>			