Post-Conference Summit Camp
Agenda and Schedule of Events, November 3–5, 2017

CE = has been submitted for continuing education credit for CFPs, CIMAs, and CFAs

FRIDAY, November 3, 2017 (Sessions and Meals will be in the same building as the SRI Conference)	
~~ *See The SRI Conference Schedule of Events* ~~~~~~~~~~~~~~~~~~~~~~~~~~~	
07:45am – 6:00pm	Summit Camp Registration Open Group Registration Desk
12:00 – 1:00pm	SRIC17 Lunch and SRI Service Award Presentation Ballroom
1:00 – 2:00pm	SRIC17 Final Plenary Program and Wrap-Up Ballroom
2:30 – 3:30pm	*Economic Forecast:* (CFP CE Approved) Speaker: Mel Miller, CFA Carousel
3:35 – 5:15pm	Meet the Managers: Presentations by Managers of Model Folios ~ Attendance Open to Anyone on Site ~ We expect the following managers to present: Stance Capital, Pax, Azzad, Boston Common, Everence, Appleseed, SKBA, Shelton Capital, SNW, Calvert, Trillium, JPS, Green Alpha, Breckinridge, Jantz, Advisor Partners, HIP, High Impact, Zevin, Keel, Green Century, First Affirmative Carousel
5:30 – 6:30pm	First Affirmative Compliance Workshop *~ REQUIRED for First Affirmative IARs and Staff ~* Kathy Lewis, Katy Lee Garden Room
6:00 – 6:50pm	RECEPTION: Cash Bar Ballroom
6:50 – 7:10pm	Awards and Recognitions Ballroom
7:10 – 7:40pm	*Why We Do What We Do* Kimberly Terry, Ken Jacobs, Farewells Ballroom
7:40 – 8:45pm	DINNER Ballroom
8:45 – 10:00pm	Dessert on the Beach:

October 20, 2017

SATURDAY, November 4, 2017 (All Sessions and meals will be held in Grande Hall)			
7:15 – 8:30am	BREAKFAST Grande Hall: Wilder Complex		
7:30am—6:00pm	Registration / Information Desk Open Grande Hall Foyer: 2nd Floor		
8:30 – 9:45am	*The Future of Wealth Management* Bob Veres Grande Hall: Viceroy		
9:45 – 10:00am	BREAK Wilder Complex		
10:00 – 11:15am	*How to Keep a Client for Longer Than Life* Barbara Culver, CFP, ChFC, CLU, AEP Grande Hall: Viceroy		
11:25am – 12:25pm	*Best Interest Evaluation of First Affirmative Managed Account Solutions* George R. Gay CFP, AIF Viceroy	*ERISA / DOL Update* (CFP CE Approved) Katy Lee, Kathy Lewis Empress	*For Advisors: Having the SRI Conversation (Submitted for CFP CE)* Mike Sakraida, Patrick Drum Regent
12:30 – 1:20pm	LUNCH Wilder Complex		
1:30 – 2:30pm	*Shareowner Advocacy and Impact: Introduction (Submit for CE)* Holly Testa Viceroy	*FOLIOfn Innovations: SRI Robo & VIA Folio* Greg Vigrass, Sanjeeb Rajput, Blaine McLaughlin Empress	*Islamic Finance and Investment Management* (CFP CE Approved) Joshua Brockwell Regent
2:40 – 3:40pm	*ERISA / DOL Update* (CFP CE Approved) Katy Lee, Kathy Lewis Viceroy	*Understanding Health Savings Accounts & Using SRI Investment Models in them (Submitted for CFP CE)* Joseph Caruso, Mike Taylor, Jim Claire Empress	*For Advisors: Having the SRI Conversation* [#2] *(Submitted for CFP CE)* Mike Sakraida, Patrick Drum Regent
3:40 – 3:55pm	BREAK Wilder Complex		
4:00 – 5:00pm	*CFP Code of Ethics* [Hour 1 of 2] (CFP Ethics CE Approved) Johann Klaassen PhD, CFP, AIF Viceroy	*FOLIOfn Innovations: SRI Robo & VIA Folio* Greg Vigrass, Sanjeeb Rajput, Blaine McLaughlin Empress	*Shareowner Advocacy and Impact: Planning for 2018* Holly Testa Regent
5:10 – 6:10pm	*CFP Code of Ethics* [Hour 2 of 2] (CFP Ethics CE Approved) Johann Klaassen PhD, CFP, AIF Viceroy	*Understanding Health Savings Accounts & Using SRI Investment Models in them (Submitted for CFP CE)* Joseph Caruso, Mike Taylor, Jim Claire Empress	*Islamic Finance and Investment Management* #2 (CFP CE Approved) Joshua Brockwell Regent
7:15pm ------	DINNER on Your Own		

7:15 – 8:45pm	Focus Group Dinner ~ By Invitation ~ Coronet Room
7:15 – 8:45pm	First-Timer Dinner: Up Close and Personal ~ By Invitation ~ Executive Room
	NOTE: SET CLOCKS BACK ONE HOUR TONIGHT!

SUNDAY, November 5, 2017 (Sessions and Meal will be in Grande Hall)			
7:30 – 8:30am	BREAKFAST Regent		
8:30 – 10:15am	*Advisor Update: 2017–2018 and Beyond* George R. Gay Viceroy		
10:15 – 10:30am	BREAK Regent		
10:30 – 11:45am	*Buying and Selling a Financial Services Business* David Grau, Jr. Viceroy		*Maximizing the Advisor's Value in a Low Return World (CFP CE Approved)* R. Kevin O'Keefe, CIMA Empress
11:45am – 12:15pm	Wrap-Up and Depart Viceroy		