



9th Annual Wealth and Asset Management Conference

AGENDA



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details

- 8:00 a.m.** Check-in | Breakfast | Networking
- 8:30 a.m.** Welcome Remarks
- 8:35 a.m.** Session 1: Innovation and the Future of Wealth Management
- 9:30 a.m.** 15-minute break
- 9:45 a.m.** Session 2: Behavioral Finance and Investment Psychology
- 10:45 a.m.** 15-minute break
- 11:00 a.m.** Session 3: Ultra High Net Worth (UHNW) Client Strategies
- 11:45 a.m.** Lunch
- 1:15 p.m.** Session 4: Changing Landscape of Wealth Management
- 2:15 p.m.** 15-minute break
- 2:30 p.m.** Session 5: Stablecoins and the GENIUS Act - Ushering in a New Era of Finance
- 3:15 p.m.** Session 6: Impact of Tariffs on Investments
- 4:00 p.m.** Closing remarks, followed by a reception in Frick Forum