Tuesday, 10/10/2017

1:00 pm - 5:00 pm	**Partner University** Alliance Partner Advisors and Team Members are encouraged to register for this session.
6:00 pm - 8:00 pm	**Carson Group Partners Cocktails & Dinner - Sponsored by BlackRock** Bus will depart from Hilton Omaha at 5:30 pm and return at 9:00 pm.

Wednesday, 10/11/2017

7:00 am - 12:00 pm	**Carson Group Partners Summit** As an Alliance Partner, one Advisor and one key Team Member from each Partner office is encouraged to attend the Partner Summit.
9:00 am - 6:00 pm	**Registration Desk Open**
12:30 pm - 4:45 pm	**Elite Advisor Summit**

We will once again offer roundtable networking during this session. Come prepared to share and discuss thoughts, trends, and opinions of Elite Advisors today.

To qualify for the Elite Advisor Summit, you must currently be working with a Peak Executive Business Coach AND have at least $1,000,000 in individual gross revenue or $100,000,000 in AUM.

1:00 pm - 4:00 pm

InvestmentNews Research: Adviser Compensation & Staffing Workshop (This workshop costs an additional $130 fee and will conflict with the Elite Advisor Summit and other Wednesday afternoon sessions.)
Mark Bruno, Associate Publisher, InvestmentNews
Matt Sirinides, Senior Research Analyst, InvestmentNews

In this highly insightful workshop, InvestmentNews Associate Publisher, Mark Bruno, and Senior Research Analyst, Matt Sirinides, share exclusive data and highlights from its bellwether benchmarking study that will identify best practices for setting and structuring compensation and benefits packages throughout your organization.The InvestmentNews duo will discuss the new 2017 Adviser Compensation and Staffing Study, staffing for future growth, and making the case for NextGen.

(NOTE: This session will conflict with the Elite Advisor Summit and other Wednesday afternoon sessions.)

3:00 pm - 4:45 pm

Advisor Networking Session
For those who won't be participating in our exclusive Elite Advisor Summit, we are giving you the opportunity to glean the same sort of feedback, insight, and advice from your peers during our Advisor Networking Session. Discuss a number of topics and get meaningful tips on challenges facing your firm including:

- Client Experience
- Generating New Clients
- Management of Team
- Best Ideas

3:30 pm - 5:30 pm

Carson Group Office Tour
The bus will depart from the front of the Hilton Omaha at 3:45 pm and will return at 5:30 pm.

(NOTE: This session will conflict with the Elite Advisor Summit and other Wednesday afternoon sessions.)

5:15 pm - 6:00 pm

First Time Attendee Reception

6:00 pm - 8:15 pm

Opening Night Reception
Join us at the Carson Group Hangar for the Welcome Reception featuring Country Music Artist Cole Swindell. Buses will depart from Hilton Omaha at 5:45 pm and will return at 9:00 pm.

Thursday, 10/12/2017

7:00 am - 6:30 pm	**Registration Desk Open**
7:00 am - 8:00 am	**Breakfast**
8:00 am - 9:15 am	**General Session - Bill Rancic** Bill Rancic, Author, Entrepreneur, Motivational Speaker How to Succeed in Business and Life: Many strategies helped make Bill Rancic a successful entrepreneur. From starting a boat wash and wax business while in college to running a million dollar company and working for Donald Trump, Bill will share the ups and downs on his road to success. Bill's talk gives the audience a glimpse on lessons he has learned throughout his many business experiences. Some of the lessons are; How to Break from the Pack, Make Each Day Count- Twice, and Separate Your Expectations from your Shortcomings. This motivational speech is packed with advice that audience members can apply to their lives immediately.
9:15 am - 9:45 am	**Photo Opportunity with Bill Rancic** This session is limited to advisors only. If you wish to include your team in your picture, please have them join you during this time.
9:15 am - 9:45 am	**Break**
9:45 am - 10:30 am	**Advisor Ed Sessions Wave 1**
Session #1	**How the Active vs. Passive Argument is Wrong-Headed and Misses the Point - presented by Swan** Marc Odo, Director, Swan Global Investments Rob Swan, COO, Co-Portfolio Manager, Swan Global Investments For years the debate has been raging between active and passive managers. Swan's opinion on the topic is: 'It doesn't matter. Active or passive, it doesn't matter." The reason for this controversial stance is both active and passive managers are heavily exposed to market risk, and market risk is the biggest risk any investor faces. Join Rob Swan and Marc Odo as they discuss their findings on this topic. As always, Swan will have an open Q&A session with the portfolio managers during this session.
Session #2	**Plan it Forward: Prospecting, Planning, and Understanding the Big Picture - presented by eMoney** Brad Frey, Regional Sales Manager-Midwest, eMoney Advisor Tomorrow's clients have different needs and expectations than today's, but you have to pay attention to them now. Learn how eMoney's latest features and forthcoming products support a financial planning-led client lifecycle for all types of clients. From marketing and prospecting to analytics and simplified planning, see how you can drive growth at scale. Hear from Brad Frey who will highlight eMoney's approach to staying ahead of the innovation curve as he shares industry trends and best practices from today's most successful advisors. Joining Brad on stage, you will hear from some of your peers during a live Q&A at the end of the session.
Session #3	**Dive Into the Shark Tank or Outswim the Sharks - presented by CNL Securities** With equity and bond markets at record levels, advisors are under increasing pressure to help high-net-worth investors maintain their financial edge. While alternative investments represent nearly 3% of overall asset allocation, new options, such as private capital funds, may provide you the crucial edge that helps differentiate your business, diversify client portfolios, and attract more investor money.
Session #4	**Are You Sears or Amazon? - presented by Carson Group Partners** Aaron Schaben, Managing Partner, Carson Group Partners

	Is your practice declining or growing? Are you equipped to sustain the industry changes we are all facing and come out on top, or are you struggling to keep up and adapt? Set your firm up to survive and thrive - and grow in the process - in this season of opportunity. Come learn how technology is enhancing value for Carson Group partners and their clients by improving productivity, efficiency, and simplifying the client investment experience.
Session #5	**Unintentional CEO - presented by Carson Group Coaching** Scott Wood, Executive Business Coach, Carson Group Coaching Catherine Williams, Executive Business Coach, Carson Group Coaching From entrepreneur and trusted advisor to CEO and business leader. Where on the spectrum are you? What does it mean to be an unintentional CEO? Examine the techniques and mindset necessary to move your firm to the next level as the needs of your organization evolve.
Session #6	**Behavioral Advice: The Smart Money Philosophy - presented by SC Distributors (CFP CE Credit)** Chuck Wachendorfer, President of Distribution, Think2Perform The Smart Money Philosophy and Preparing Your Clients for the Certainty of Uncertainty Data shows investments work, investors don't. Why? In this presentation participants will learn both the answer to that question as well as what to do about it. Expect to have fun. Expect to walk away knowing you can enhance your value proposition.
10:30 am - 10:45 am	**Break**
10:45 am - 11:30 am	**Advisor Ed Sessions Wave 2**
Session #1	**How the Active vs. Passive Argument is Wrong-Headed and Misses the Point - presented by Swan** Marc Odo, Director, Swan Global Investments Rob Swan, COO, Co-Portfolio Manager, Swan Global Investments For years the debate has been raging between active and passive managers. Swan's opinion on the topic is: 'It doesn't matter. Active or passive, it doesn't matter." The reason for this controversial stance is both active and passive managers are heavily exposed to market risk, and market risk is the biggest risk any investor faces. Join Rob Swan and Marc Odo as they discuss their findings on this topic. As always, Swan will have an open Q&A session with the portfolio managers during this session.
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11:30 am - 1:00 pm	**Lunch**
1:00 pm - 2:30 pm	**General Session - High-Impact Presentations** Kindra Hall, Speaker, Author, Consultant, The Hall Company Sterling Shea, Associate Publisher, Head of Advisory & Wealth Management Programs, Barron's Ron Carson, Founder and CEO, Carson Group Paul West, Managing Partner, Carson Wealth Management Presentation 1 - The Irresistible Power of Strategic Storytelling - presented by Kindra Hall: Businesses, brands, sales forces, marketing teams, and leaders at all levels are desperately trying to capture attention and resonate with consumers who expect more. Is there a secret weapon? A silver bullet to humanize and connect? Yes. The answer is strategic storytelling. Far from jargon or fluff, Kindra’s approach to storytelling is razor-sharp and immediately actionable. The result: Using Kindra’s blueprint for effective storytelling, attendees leave empowered and equipped to close more sales, build better relationships, or blow up their brands by leveraging the irresistible power of their stories. Presentation 2 - The Best Kept Secrets of Barron's Top Advisors - presented by Sterling Shea: Sterling Shea, Associate Publisher and Head of Advisory and Wealth Management Programs at Barron's, will share his valuable insight on what it takes to be Barron's ranked, as well as the most important strategic focus areas of the top organic growth advisors in our profession. Presentation 3 - Evolution of Planning - presented by Ron Carson and Paul West: Ron Carson and Paul West will show how planning has moved from being a nice-to-have offering with clients to table-stakes. Additionally, they will provide their vision for what they want planning to look like at Carson Wealth in 2020.
2:30 pm - 3:00 pm	**Break**
3:00 pm - 4:30 pm	**General Session - Kristen Johnson Brogan**

	Kristen Johnson Brogan, Chief Nutrition Officer, On Target Living <u>Mindful Leadership: How to Become a Leader Who Stays Present and Calm in a Sea of Chaos and Stress</u> Focus and follow through are becoming increasingly rare skills in our "always on" digital environment. Constant distractions (chats, tweets, beeps, emails, texts, etc.) magnify stress and mess up our best intentions. Stress, anxiety, depression, and work/life imbalances are rampant inside most organizations. How can a leader produce results, inspire a team, and handle their environment without focus, follow-through, and a clear, calm mind? In this hugely insightful and practical keynote, Kristen will share the secrets to becoming a mindfully present leader who can handle complex situations with intentional focus.
4:30 pm - 6:30 pm	**Reception - Sponsored by eMoney**
6:30 pm - 9:00 pm	**Dine-arounds (Sponsored)**

Friday, 10/13/2017

6:30 am - 7:30 am	**BYOB Yoga Workout with Kristen Johnson Brogan** Join Kristen as she takes you through a dynamic yoga routine that improves alignment, balance, strength, flexibility, and overall fitness. She will help you to incorporate breathing and mindfulness into your fitness practice, allowing you to be more present in the moment for an efficient and result-driven outcome. No equipment required - just bring your own body (BYOB)!
7:00 am - 12:30 pm	**Registration Desk Open**
7:00 am - 8:30 am	**Breakfast**
8:30 am - 9:45 am	**General Session - Col. Arthur Athens** Colonel Arthur Athens, Director, U.S. Naval Academy Center for Ethical Leadership, USMCR (Ret.) Speaking Truth to Power Followers have two primary responsibilities towards their leader...to help make that leader successful and challenge the leader when appropriate. Often the second role is the more difficult one. How do we properly express our opposition to a plan, process, policy or decision? Do we handle unethical concerns the same way we handle differences of opinion? What do we do if our recommendations are not accepted? How do we maintain trust with the leader when we are challenging his or her direction? What is the difference between being a maverick and a thoughtful dissenter? This presentation will take a close look at "speaking truth to power."
9:45 am - 10:05 am	**Break**
10:05 am - 12:00 pm	**General Session - Judson Laipply, Ron Carson, Brandon Kawal, and Aaron Schaben** Judson Laipply, Owner, Master of Education Degree, CSP, Evolution of Dance

Ron Carson, Founder and CEO, Carson Group
Aaron Schaben, Managing Partner, Carson Group Partners
Brandon Kawal, Consultant, Advisor Growth Strategies

Life is Change - presented by Judson Laipply: Socrates once said, "Perfection is constant change." Life is change. Day in and day out the thing that remains constant is change. Judson combines laughter-inducing stories with thought-provoking ideas to drive home the point that we are in the constant presence of change.

His stories, personal experiences, crowd participation, high energy, and laughter help people recognize how to let go of the things out of their control and focus their energies on the things they can change. Judson's finale, *Evolution of Dance*, will leave you with an unforgettable message -- one which will remind you that "Life is Change," and you have the ultimate control over the outcome.

Top 5 Things You Should Always Do to Survive and Thrive in the Future - presented by Ron Carson: To survive and thrive in the future, advisors must become international leaders who run their firms like a business. Ron Carson shares how he continues to evolve in these areas:
- Hire and lead an A+ team
- Create a firm brand that has substance and sizzle
- Deliver financial planning as a foundational aspect of your business
- Maximize technology
- Define success by tracking Key Performance indicators

Win with Millennials - No Trophies Needed - presented by Brandon Kawal and Aaron Schaben: Millennials, Brandon Kawal and Aaron Schaben, debunk millennial myths and share how to win with millennials by attracting, growing, and retaining the next generation.

12:00 pm - 1:00 pm	**Grab & Go Lunch**