

EXCELL

MAY 30 - JUNE 1, 2018

ARIA Resort and Casino | Las Vegas



Wednesday, 5/30/18

9:00 am - 6:00 pm

Registration Desk Open

12:30 pm - 3:00 pm

Mastering the Essential 7 (First time attendees must attend this session)

This session will focus on implementing Carson Group Coaching's core concepts, from Blueprinting your personal and professional life to growing your business through passion prospecting. It will serve as an introduction to many of the best practices Carson Group Coaching teaches and will help you assist your advisor in the implementation of Blueprinting, enhancing your client experience, building your team, fine-tuning your systems and operations, and many other areas such as productivity and time management. Lunch will be provided for those participating in this session. Note: Content is not geared towards Associate Wealth Advisors.

12:30 pm - 3:00 pm

Networking by the Numbers

It can be hard to find like-minded firms and team members who share ideas and want to network. In this session, Diana Koger and Mindy Dalrymple, Carson Group Coaching's Client Relationship Specialists, will help facilitate introductions to peers and connect on issues related to your firm size, type, and set of challenges. Note: Content is

targeted for team members who have attended at least one previous Excell conference.

1:00 pm - 5:00 pm

3:00 pm - 4:45 pm

IQ (Implementation Quotient) Breakouts

Let's Talk About Tech: Avoiding Information Overload - Ben Mathis, Chief Information Officer, Carson Group

Most advisors find themselves scratching their heads when it comes to integrating technology into their business. Between navigating endless software solutions, investing capital aimlessly at new tools, and falling behind on the latest and greatest tech trends, advisors need one thing above all else: a clear game plan for tackling their technology. In this session, Ben Mathis, Chief Information Officer at Carson Group, will share some of the biggest obstacles advisors face when taking on tech, the key questions that can provide clarity on your firm's direction and, most importantly, how firms can create their own roadmap to success. Advisors will hear first-hand lessons on how Carson Wealth navigated the complexity of integrating technology, how to start with the client and work backwards, and what is on the horizon for tech in our profession.

Catching Culture: Key Attributes of the Strongest Teams - Kelsey Ruwe, Vice President of Talent, Carson Group

As small business owners, advisors and their teams face a formidable opponent in the growth of their firm: larger organizations that offer big compensation packages, limitless perks and edgy work environments, all in an effort to attract top talent. In this session, Carson Group's Vice President of talent will share the biggest mistakes advisors make in creating a "culture" and explain the key characteristics and behaviors advisors must adopt to turn "culture" from a collection of empty words into a tangible force that unites teams, aligns infrastructure and improves moral.

Stay Focused and Simplify: 3 Ways to Move the Needle with Your Marketing - Joe Steuter, Vice President, Marketing Communication, and Melissa Mroczek, Vice President, Advisor Marketing

Building a brand that investors inherently trust is not as easy as it once was. With more exposure to new services, more ways to educate and evaluate options, and less time to make decisions, attracting new clients has become as much of a science as it is an art. In this session, Melissa Mroczek, Vice President, Advisor Marketing and Joe Steuter, Vice President, Marketing Communication for Carson Group, share their unique perspective on what potential clients are looking for from their advisor and, more importantly, how firms can eliminate the complexity of their marketing plan by focusing on three needle-moving activities to drive more conversions: email campaigns, blogging, and social media. Advisors and their teams will walk away from a simple marketing action plan that drives better ROI and reduces ADD (Advisor Distraction Disorder).

Inside the Coach Roundtable: The Invisible Influencers Shaping Your Firm's Future - Carson Group Executive Business Coaches

Have you ever wanted to jump inside the mind of someone who sees things you can't, as an advisor? In this session, our panel of Executive Business Coaches will help you escape from the proverbial "island" so many

advisors find themselves on, wondering what others are doing to grow their business and find balance. Through their unique lens, the Carson Group coaches will unveil the biggest trends they're noticing through talking with hundreds of advisor firms across the country. Get an insider's perspective at the seat of the coach's roundtable and discover the most common challenges plaguing advisor growth, the biggest complexities facing teams, and the taboo questions most advisors need to answer.

5:15 pm - 6:00 pm

First Time Attendee Reception

Is this your first time attending Excell? Then you won't want to miss this session. You will meet fellow first time attendees as well as our Executive Business Coaches. We will highlight the agenda for the next few days.

6:00 pm - 9:00 pm

Opening Night Reception - Sponsored by CNL

It's Vegas, so we'll kick things off in style. Network with your fellow attendees and enjoy the atmosphere. Blues Traveler will perform at this private event.

Thursday, 5/31/18

7:00 am - 6:30 pm

Registration Desk Open

7:00 am - 8:30 am

Breakfast

8:30 am - 9:45 am

General Session - Marc Randolph

Mr. Marc Randolph, Netflix Co-Founder, Executive Mentor and Angel Investor, Netflix

Where Do Ideas Come From: Learn how Silicon Valley's Most Exciting Startups Come Up With Their Ideas and How They Turn Those Ideas Into Reality.

Anyone who has taken a shower has had an idea. But how do you turn those ideas into reality? Netflix Founder and startup CEO Marc Randolph will share dozens of tips, tricks and stories drawn from his 4 decades as an entrepreneur that will help you more easily come up with innovative ideas, validate them, and get your new venture off the ground. Equal parts inspiration, start up stories, and practical tips, it's a message that resonates equally well with students, early stage entrepreneurs, and any businessperson looking to bring innovation to their business. You'll laugh, you'll cry, you'll wonder who the hell comes up with this crap!

9:45 am - 10:15 am

Break

10:15 am - 12:00 pm

General Session - Ron Carson, Paul West, and Arianna Huffington

Mr. Marc Randolph, Netflix Co-Founder, Executive Mentor and Angel Investor, Netflix

Confronting the F-Word: Reframing Advisor Value - Ron Carson and Paul West

As the profession moves towards increased transparency, your clients are demanding straightforward fees, clear explanations and, most importantly, a new definition of the value you provide. In this session, Ron Carson, CEO and Founder of Carson Group, and Paul West, Managing Partner of Carson Wealth, share helpful sound bites and real-world examples of how to confront the F-word: fees. Hear how these two top advisors from a Barron's Hall-of-Fame

firm handle client fee objections and reframe the conversation to focus on the alpha beyond investment management.

The Sleep Revolution - Arianna Huffington

In an increasingly fast-paced and hyper-connected world, sleep deprivation has become a global epidemic, with devastating effects on our health, our performance and our relationships. In this talk, Arianna Huffington—*New York Times* best-selling author and president and editor-in-chief of the Huffington Post Media Group—offers a sweeping exploration of sleep, from its rich history to the latest science, with an emphasis on how it can transform our lives. Through personal stories and specific, science-backed tips and recommendations, Huffington addresses the most critical issues with her audience: why we sleep, why we need it, what happens when we don't get enough, and how to get more, so we can take control of our lives and live more fully.

12:00 pm - 1:00 pm

Team Networking Lunch

1:00 pm - 2:00 pm

Team Track - Tips for Team Building

Every workplace has a unique dynamic just as every team creates its own culture. In this session, the Carson Group Coaching team will share tips on how to strengthen the bond among your team and execute team outings to create a work environment that inspires.

2:00 pm - 3:00 pm

Team Track - Why & How Prospects Choose Advisors

Brad Shepard, Head of Advisor Innovation at WisdomTree and the founder of Kredible, will challenge advisory firms to truly think about the customer acquisition process differently and provide tangible next steps to potentially enhance their practice. Building upon a research process involving thousands of investors WisdomTree, through its Kredible offering, is decoding the life event triggers that can lead to a prospect selecting a firm for that critical first meeting.

3:00 pm - 3:15 pm

Break

3:15 pm - 4:45 pm

General Session - Howard Tullman and Ron Carson

Ron Carson, Founder and CEO, Carson Group

Mr. Howard Tullman, CEO, 1871

We'll conclude the day in general session with futurist Howard Tullman, and Carson Group Founder and CEO Ron Carson, who will tie it all together and share what the nation's top advisory firms are focusing on in 2018 and beyond.

4:45 pm - 6:00 pm

Exhibitor Reception

Unwind after a productive day with cocktails, conversation, and continued networking.

6:30 pm - 9:00 pm

Dinner - On Your Own

Friday, 6/1/18

7:00 am - 12:30 pm

Registration Desk Open

7:00 am - 8:30 am

Breakfast

8:30 am - 9:45 am

General Session

We'll start the final day of Excell with more powerhouse keynotes.

9:45 am - 10:05 am

Break

10:05 am - 12:00 pm

General Session

You'll hear from an expert on Blockchain and why it's technology shift of the magnitude of the Internet itself - you'll hear how it's changing the financial advisory world and what you should be doing to prepare for this bold new world. You'll also hear from a panel of industry thought leaders as well as experts on leadership. We will wrap up the morning hearing from an advisor on how he built a \$100M business in 3 years fresh out of college and becoming a Forbes Top 50 Next Gen Advisor.

12:00 pm - 1:00 pm

Grab & Go Lunch