



Soltis Investment Advisors

18th Annual Fiduciary Committee Conference

April 9th, 2021

Agenda

- 9:30 – 10:00 am **Conference Welcome & Fiduciary Training – “Innovation for You”**
Tyler Finlinson, CIMA® Managing Partner, Institutional & Retirement Plan Services
- 10:00 – 11:00 am **Live Hard: Getting Real About Creativity and Innovation**
Dr. Todd Dewett, Best Selling Author, Top 100 Leadership Speaker for Inc Magazine and TEDx Speaker Series
- 11:00 – 11:45 am **The Regulatory Landscape in a Post COVID World**
Fred Reish, Partner, Faegre Drinker
- 11:45 – 12:00 pm **Break**
- 12:00 – 12:45 pm **Innovation, Trends, & Best Practices**
Kim D. Anderson, AIF® CHSA®, President & CEO
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| <i>Joe Szathmary</i> | <i>Eric Funk</i> |
| <i>Charles Schwab</i> | <i>Fidelity</i> |
| <i>Andrew Matos</i> | <i>Shawn Oram</i> |
| <i>Prudential</i> | <i>Alliance Benefit Group</i> |
- 12:45 – 1:00 pm **Plan Sponsor Awards and Recognition**
- 1:00 – 1:50 pm **The Post COVID Economy**
Dr. Elliot Eisenberg
Economist and Syndicated Columnist
- 1:50 – 2:00 pm **Wrap Up & Close**