



ARETE
WEALTH

Monday, September 25	TOPIC
1pm – 4:45pm	Registration
6:00pm -7:00pm	<i>Cocktail Reception</i>
7:00pm- 8:00pm	<i>Welcome Hors d'Oeuvres</i>

Tuesday, September 26	TOPIC
7:45am – 8:45am	Breakfast & Partner Exhibits
9:00am - 9:25am	Founder and CEO Welcome
Advisor Track	
9:30am – 9:45am	Platinum Partner Spotlights: Mainstage Sessions with Featured Products
9:45am – 10:00am	Platinum Partner Spotlights: Mainstage Sessions with Featured Products
10:00am- 10:10am	Gold Partner Spotlights: Mainstage Sessions with Featured Products
10:20am- 10:50am	Partner Spotlights: Mainstage Sessions with Fidelity
11:00am- 11:50am	Gold Sponsor: Mainstage Sessions with Featured Products
11:50pm -12:50pm	Lunch & Partner Exhibits
1:00pm-1:45pm	Telos Demo
2:00pm-2:45pm	Featured Keynote Speaker: Brian Portnoy- Shaping Wealth
3:00pm-4:45pm	Partner Highlights “Speed Sessions” (10-min) <i>(10 min mini session rotations)</i>
5:00pm- 5:45pm	Break / Free Time
Operations & Staff Track	
9:00am-11:30am	Assistant & Key Staff Sessions
11:50pm-12:50	Lunch
1:00pm- 2:45pm	Assistant & Key Staff Sessions

Full Conference Schedule for All Attendees

6:00pm – 9:00pm	Full Conference Reception sponsored by Empire
	<i>Dine Arounds' Moving Dinners begin</i> <i>*Prior to the event, you need to sign up at Registration for any Dine Around dinner</i>
Wednesday, September 27	TOPIC
7:45am – 8:45am	Breakfast & Partner Exhibits
9:00am - 9:25am	Grow AUM with Cash Management with COO
Advisor Track	
9:30am – 9:45am	Platinum Partner Spotlights: Mainstage Sessions with Featured Products
9:45am – 10:00am	Platinum Partner Spotlights: Mainstage Sessions with Featured Products

10:00am- 10:10am	Gold Partner Spotlights: Mainstage Sessions with Featured Products
10:20am- 10:50am	Partner Spotlights: Mainstage Sessions with Pershing
11:00am- 11:40am	Gold Sponsor: Mainstage Sessions with Featured Products
11:50am -12:50pm	Lunch & Partner Exhibits
1:00pm-1:45pm	Arete Advisory Platform
2:00pm-3:45pm	Arete Wealth Town Hall (registered reps & staff only) <ul style="list-style-type: none"> ● <i>Annual compliance meeting</i> ● <i>Featured Topics</i> ● <i>From the Field: Q&A</i>
4:00pm-5:45pm	Partner Highlights “Speed Sessions” (10-min) <i>(10 min mini session rotations)</i>
	Conference Agenda for Sponsor Sessions concludes
Operations & Staff Track	
9:00am-11:50am	Assistant & Key Staff Sessions
11:50pm -12:50pm	Lunch
1:00pm-1:45pm	Assistant & Key Staff Sessions
2:00pm-3:45pm	Arete Wealth Town Hall (registered reps & staff only) <ul style="list-style-type: none"> ● <i>Annual compliance meeting</i> ● <i>Featured Topics</i> ● <i>From the Field: Perspectives from our Branches</i>
5:45pm- 6:00pm	BREAK
Full Conference Schedule for all Attendees	
6:00pm – 7:00pm	Full Conference Reception
7:00pm – 8:30pm	Conference Dinner Celebration

Thursday, September 28	TOPIC
7:45am – 8:45am	Bon Voyage Breakfast
	<i>Departures</i>

For full agenda details, including locations and your specific session assignments, download the Arete Wealth Assembly mobile app. Visit the Assembly Registration desk if you need assistance.