



2018 MMI



ANNUAL CONFERENCE

OCTOBER 15-17, 2018 ■ HYATT REGENCY DALLAS ■ DALLAS, TX

Hyatt Regency Dallas | 300 Reunion Boulevard | Dallas, TX

Agenda as of June 29, 2018

Date	Time	Session Type
Monday, October 15	1:00pm-1:15pm	Opening Remarks
Monday, October 15	1:15pm-2:00pm	Keynote Session Joseph Sullivan, Chairman & CEO, Legg Mason
Monday, October 15	2:00pm-3:00pm	General Session
Monday, October 15	3:00pm-3:30pm	Solutions Spotlight
Monday, October 15	3:30pm-4:00pm	Networking Break
Monday, October 15	4:00pm-5:00pm	General Session
Monday, October 15	5:00pm-5:15pm	President's Update
Monday, October 15	5:15pm-7:00pm	Opening Reception at The George W. Bush Presidential Library and Museum
Tuesday, October 16	7:00am-8:00am	Networking Breakfast
Tuesday, October 16	8:00am-9:00am	Keynote Speaker John O'Leary, Author & Motivational Speaker
Tuesday, October 16	9:15am-10:15am	Executive Spotlight Moderator: Craig Pfeiffer, President & CEO, Money Management Institute Panelists: Valerie Brown, Executive Chairman, Advisor Group Christian Mitchell, Vice President, Investment Products & Services, President & CEO, Northwestern Mutual Wealth Management Company John Taft, Vice Chairman, Baird
Tuesday, October 16	10:15am-10:45am	Networking Break
Tuesday, October 16	11:00am-12:00pm	Sales & Marketing: Session 1
Tuesday, October 16	11:00am-12:00pm	Regulatory & Compliance: Session 1
Tuesday, October 16	11:00am-12:00pm	Tools & Technology: Session 1

Tuesday, October 16	11:00am-12:00pm	Product Solutions: Session 1
Tuesday, October 16	12:00pm-1:15pm	Networking Luncheon
Tuesday, October 16	1:15pm-2:15pm	Sales & Marketing: Session 2
Tuesday, October 16	1:15pm-2:15pm	Regulatory & Compliance: Session 2
Tuesday, October 16	1:15pm-2:15pm	Tools & Technology: Session 2
Tuesday, October 16	1:15pm-2:15pm	Product Solutions: Session 2
Tuesday, October 16	2:30pm-3:30pm	Sales & Marketing: Session 3
Tuesday, October 16	2:30pm-3:30pm	Regulatory & Compliance: Session 3
Tuesday, October 16	2:30pm-3:30pm	Tools & Technology: Session 3
Tuesday, October 16	2:30pm-3:30pm	Product Solutions: Session 3
Tuesday, October 16	3:30pm-4:00pm	Networking Break
Tuesday, October 16	4:00pm-5:00pm	Sales & Marketing: Session 4
Tuesday, October 16	4:00pm-5:00pm	Regulatory & Compliance: Session 4
Tuesday, October 16	4:00pm-5:00pm	Tools & Technology: Session 4
Tuesday, October 16	4:00pm-5:00pm	Product Solutions: Session 4
Tuesday, October 16	5:00pm-6:30pm	Networking Reception
Tuesday, October 16	6:30pm-9:00pm	MMI/ <i>Barron's</i> Industry Awards Dinner
Wednesday, October 17	7:00am-8:00am	Networking Breakfast
Wednesday, October 17	8:15am-9:00am	General Session
Wednesday, October 17	9:00am-9:30am	Solutions Spotlight
Wednesday, October 17	9:30am-10:30am	Breakout Choose one of two sessions
Wednesday, October 17	10:30am-11:00am	Networking Break
Wednesday, October 17	11:00am-12:00pm	General Session
Wednesday, October 17	12:00pm	Closing Remarks