2020 MMI LEADERSHIP PATHWAY SEMINAR

DECEMBER 1 & 3, 2020 ▪ WWW.MMINST.ORG

Tuesday, December 1, 2020

11:00 AM – 11:15 AM ET

Opening Remarks and Seminar Overview

Sarah Nau, Vice President, Leadership Pathway Program Manager, Money Management Institute

Seminar Co-Chairs:
Brad Eisen, Senior Divisional Director, Salient
Ryan Logue, Manager, Business Development & Planning, Franklin Templeton Investments

11:15 AM – 12:15 PM ET

Framework for Success: V+I=S
Dr. Ellen Reed, a mental toughness expert and top performance coach for over 10 years, shares tips for developing a framework *for knowing that you are doing what it takes on a daily basis to achieve your greatness.*

- **Vision:** Define your win. Knowing where you want to go is a key step toward achieving your greatness – and one that most people skip. Learn a proven technique to help make your vision a reality.
- **Integrity:** Define what it will take on a daily basis to achieve the vision. Execute on your most important daily process goals to get one step closer to your vision every day.
- **Success:** Focus on doing *less* to achieve *more.* Learn a method to measure whether you are on track for results, and how to evaluate and adjust along the way.

Dr. Ellen Reed, Director of Mental Training under Dr. Jason Selk, Enhanced Performance, Inc.

12:15 PM – 12:30 PM ET

Break

12:30 PM – 1:00 PM ET

Perfection to Performance: The Relentless Solution Focus Mindset
When faced with adversity, individuals typically turn to *problem-centric thought*. It's a normal reaction, but one that erodes individual and organizational potential for growth and success. What if you could instead rewire your brain toward *solution-focused thinking*? The Relentless Solution Focus (RSF) mindset can be learned to make solution-focused thinking the norm. In this follow-up session, you'll learn a proven tool that trains the RSF mindset in less than two minutes per day and can help increase your health, happiness, and success.

Dr. Ellen Reed, Director of Mental Training under Dr. Jason Selk, Enhanced Performance, Inc.

1:05 PM – 1:35 PM ET

Rapid Fire Research
Two industry-leading researchers share their views and fearless predictions on what lies ahead:

- *Cerulli Associates* on the future of wealth management, including topics like the growing influence of mega-teams, the changing preferences of Next Gen advisors, and rethinking the direct channel.

	▪ *FUSE Research Network* on the five most impactful changes that will manifest in asset management distribution by 2022. **Neil Bathon,** Founder & Managing Partner, FUSE Research Network **Bing Waldert,** Managing Director, U.S. Research, Cerulli Associates
1:40 PM – 2:10 PM ET	**Peer-to-Peer Discussions** To wrap up the day, get ready to share what's on your mind – and hear the same from your fellow attendees. The group will divide up into virtual breakout rooms to interact and exchange information and ideas.
2:10 PM ET	**Concluding Remarks**

Thursday, December 3, 2020

11:00 AM – 11:10 AM ET	**Welcome and Day One Recap** **Seminar Co-Chairs:** **Brad Eisen,** Senior Divisional Director, Salient **Ryan Logue,** Manager, Business Development & Planning, Franklin Templeton Investments
11:10 AM – 11:40 AM ET	**Is Burnout Affecting Your Judgment? How to Tell and What to Do About It** In these uncertain times, it is easy to lose focus, spend time worrying about the uncertainties, and find yourself in a bit of a fog. Our clients and teams need us, but it can be hard to know how best to help them when we are feeling uncertain ourselves. This session will share insights and observations around one of the most basic enemies of sound judgment: burnout. We will talk about what it is, why you should care, and what to do about it. You will get valuable information that can help you improve your energy, feel more in control, and be in a better position to help yourself, your family, and your clients. **Greg "Heff" Heffington,** Founder, Heffington Consulting, LLC
11:45 AM – 12:15 PM ET	**"What I'm Thinking About Now": Quick Hits from Industry Leaders** In this rapid-fire session, three senior leaders representing different sides of the business take ten minutes to share the opportunities and challenges that are top of mind for them as they think about the path forward for the investment advisory industry. **Everett Johnson,** Principal & Senior Director, Edward Jones **Craig Pfeiffer,** President & CEO, Money Management Institute **Douglas Sieg,** Managing Partner, Lord Abbett
12:15 PM – 12:30 PM ET	**Break**
12:30 PM – 12:45 PM ET	**Leadership Pathway Program Updates** Hear current program updates and what is on tap heading into 2021.

Sarah Nau, Vice President, Leadership Pathway Program Manager, Money Management Institute

Leadership Pathway Co-Chair:
Patty Quinn McAuley, Director of Marketing, Clark Capital Management Group

12:45 PM – 1:05 PM ET

Getting the Most Out of Your Mentor Relationship
Successful mentor relationships depend on the strength of the connection between the mentee and the mentor. For both to benefit from the experience requires defining goals and an agenda, developing trust, and constant communication. Learn firsthand from a past Leadership Pathway mentee and a mentor how they developed strong, enduring relationships and what advice they would give to others.

Sophie Antal Gilbert, AIF®, Head of AIS Portfolio & Business Consulting, Advisor & Intermediary Solutions, Russell Investments
David Linton, Executive Vice President, Head of Distribution, Salient

1:10 PM – 2:10 PM ET

Roundtable Discussions
To facilitate peer-sharing, we will break into smaller moderated discussion groups for a deeper dive into some of the key topics addressed during the Seminar. Attendees will have a chance to share ideas and weigh in on each of the subjects.

2:10 PM ET

Closing Remarks