



Optivise Investment Adviser
WISDOM FORUM 2022

COMPLIANCE AND EDUCATION CONFERENCE

Agenda

Drury Plaza, Franklin, TN 37067

Wednesday, November 9, 2022

Day 1

		Location
6 AM - 8 AM CST 7 AM - 8 AM	Complimentary Breakfast Registration	Drury Inn – Downstairs Outside Lotz
8 AM - 8:30 AM	Welcome/State of the Firm Michael Wallin, CFP®	Lotz
8:30 - 9:45 AM	Fulfilling Promises: Building a Plan for Long-term Success Michael Wallin, CFP®	
9:45 - 10:00 AM	<i>15 Minute Break</i>	
10:00 - 11:00 AM	Optivise Advisory Services: Leveraging Tax Planning as a Marketing System and Grace Global Alliance Allen Hargis, CPA	
11:00 - 11:30 AM	Jackson National Life: Planning with RIA Annuities Brandon Anderson & Ioana Sullivan, RICP	
11:30 - Noon	Travel - Staff Carpool	Downtown Franklin
Noon - 2 :00 PM	Lunch	Americana Taphouse
Noon - 1:00 PM	Jackson National Life: Why You, Now? Steve Luckenbach	
1:00- 2:00 PM	Creating Your Own PR Package Jason Wyatt, National Artist Development University	

2:00 - 3:30 PM	Walk/ Network	Downtown Franklin
3:30- 4:00 PM	Travel (pickup at back of Americana Taphouse)	Drury Inn
6:00 - 7:00 PM	Dinner - Taco Bar	Granite City

Thursday, November 10, 2022

Day 2

6:00 - 8:00 AM	Complimentary Breakfast	Drury Inn — Downstairs
8:00 - 8:45 AM	A Sea of Change in Regulatory Accountability Michael Wallin, CFP® Jason Moore, CFP®	
8:45 - 9:30 AM	Fusion Capital: The Wizarding World of Elements Robert Pujia	
9:30 - 10:00 AM	Seeing, with 20/20 Vision, into Your Practice Jim DeCesare CRM	
10:00 - 10:05 AM	Break	
10:05 - 11:00 AM	BlackRock: Tax Foundations: Tax-Efficient Portfolios Margo DeLashmutter, CFP®	
11:05 - 11:15 AM	Travel - Staff Carpool	
11:15 - 1:15 PM	First Trust Chris Toye, CFP® Cboe Vest: Using a Structured Umbrella in Rainy Markets Luke Poggi, CAIA	Perry's Steakhouse
1:15 - 1:30 PM	Travel	
1:30 - 2:00 PM	Profit-Generating Processes: The #1 Step you CANNOT Afford to Miss! Michael Wallin, CFP®	Drury Inn - Lotz
2:00 - 2:30 PM	Optimus Advisory Group Steve Rumsey, MBA	
2:30 - 2:45 PM	Break	
2:45 - 3:15 PM	Plan Confidence, RF: 401k Advice Made Easy Kevin Clark	

3:15- 3:45 PM	The RLC Concept Michael Wallin, CFP®
3:45- 4:30 PM	Timothy Funds: A New Horizon with Timothy ETFs David Moore
Free Time	Enjoy the Town and Network!

Friday, November 11, 2022

Day 3

6:00 - 8:00 AM	Complimentary Breakfast	Drury Inn – Downstairs
8:00 - 10:00 AM	The Universe of Investments is Your Oyster Optivise's Investment Committee & Scott Magoon	Drury Inn - Lotz
10:00 - 10:15 AM	<i>Break</i>	
10:15 - 11:00 AM	ZEGA Financial: The World of ZEGA Mike Puck	
11:00 - 11:45 AM	Aptus Capital Advisors: Embracing Your Asset Allocation in 2023 James Yahoudy, CFP® David Wagner, CFA	
11:45 - Noon	<i>Break</i>	
Noon - 1:00 PM	Jackson National Life: Trust Planning for HNW Clients Chris Bogren	
1:00 - 2:00 PM	Putting a Bow on It: Comprehensive Planning that Attracts Clients Michael Wallin, CFP®	Working Lunch