ELITE | Consulting Partners

Understanding Your Needs and Delivering Results

SAVE THE DATE

Elite Consulting Partners

Advisor Workshop

"Starting or Growing a Successful Independent, RIA, or Hybrid Practice"

Thursday, May 10, 2018
Sheraton Valley Forge
King of Prussia, PA

TD Ameritrade

WEALTHCARE ADVISORY PARTNERS

RAYMOND JAMES

Hill Wallack LLP
Attorneys at Law

Triad Advisors

United Advisors

dynasty financial partners

Meet the Experts and Learn About Industry Trends

This educational and dynamic workshop, led by Elite Consulting Partners President and industry expert Frank LaRosa, brings together leading industry professionals and thought leaders from within the Independent, RIA, and Hybrid space to lead insightful discussions geared at informing financial advisors who are thinking about INDEPENDENCE, RIA, or Hybrid options or already within their chosen model on strategies that will impact their short-term and long-term business success.

Workshop Agenda and Schedule

8:30 - 9:30 Opening Remarks:
"A Day in the Life of an Independent Advisor"

9:30 - 11:45 Morning Sessions:
Tech 1 – Using Technology to Better Manage Workflow
Speaker: *Craig Cintron, VP Technology Consulting - TD Ameritrade*
Speaker: *Russell Reinhart, Director of Business Development - Wealthcare/Financeware -GDX360*
Clearing and Custody
Speaker: *Kevin Coughlin, VP Institutional Sales - TD Ameritrade*
Speaker: Austin Philbin, Divisional Director - Dynasty Partners
P&L Management – "It's all about NET"
Speaker: Dawn O'Rourke, SVP Branch Development – FSC Securities
Speaker: Kevin Coughlin, VP Institutional Sales - TD Ameritrade

12:00 - 1:00 Lunch/Multi-Affiliation Firms Panel:
Speaker: Russell Reinhart, Director of Business Development – Wealthcare Partners
Speaker: Michael Gill, VP Business Development - United Advisors
Speaker: Trevor Yochum, Business Development – Hybrid Solutions, Triad Advisors

1:00 - 3:00 Afternoon Sessions:
Tech 2 – Aggregation / Planning Tools
Speaker: *Craig Cintron, VP Technology Consulting - TD Ameritrade*
Speaker: *Russell Reinhart, Director of Business Development - Wealthcare/Financeware -GDX360*
Financing / M&A / Succession Planning
Speaker: Louis Tambaro Esq., Partner Hill Wallack, llp.
Speaker: Maggie Wilson, Advisor Succession & Practice Acquisitions - Live Oak Bank
Practice Management / Organic Growth Strategies
Speaker: Vanessa Oligino, Director, RIA Practice Management – TD Ameritrade
Speaker: Austin Philbin, Divisional Director - Dynasty Partners

Our events are designed to be much more interactive and educational than a traditional seminar or conference, **SEATING IS LIMITED...**

Early Bird Registration $35 Per Guest.

Clicking Here To Reserve Your Seat Now!

For More Information About Our Event Contact:

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Advyzon

Deutsche Bank

LIVE OAK BANK
Lending More than Capital

FSC SECURITIES CORPORATION

3:15 - 4:30 **Keynote Speaker /Closing Remarks**
Len Rienhart, CEO/Executive Chairman - Wealthcare Capital Management

Len Reinhart, Executive Chairman & CEO

Recognized as one of the founders of the separately managed account industry, Len Reinhart brings over three decades of experience and innovation to Wealthcare Partners. Prior to founding Lockwood and serving as Managing Director and member of the Executive Committee of Pershing LLC, Len was President of the Consulting Group of Smith Barney. During his time at Smith Barney and its predecessor, E.F. Hutton, Len was directly responsible for developing programs that introduced institutional-level professional investment management services to the individual investor marketplace.

If Our Current Location Doesn't Fit Your Schedule, Please Register For a Future Event.

Upcoming Roadshow Locations To Include:
Cherry Hill, NJ - Short Hills, NJ - New York, NY - Boston, MA
Atlanta, GA - Dallas, TX - Houston, TX - Miami, FL - Chicago, IL
San Diego, CA - San Francisco, CA

If you have an immediate need, and would like to consultant with us on transitioning to an independent Broker-Dealer, RIA, or Hybrid Firm, please CLICK HERE to request a confidential due-diligence call with one of our consultants.

Visit www.ercadvisors.com for more information about Elite Consulting Partners or contact franklarosa@ercadvisors.com for a confidential discussion.

Visit Our Website

Why Elite Consulting Partners