FIDUCIARY INVESTMENT ADVISORS

2018 Annual Conference Agenda

September 20-21, 2018
Connecticut Convention Center
Hartford, CT

Thursday, September 20, 2018

10:15 – 11:00 AM	**Registration**
11:00 AM – 11:05 AM	**Welcome** Mike Goss, Executive Vice President
11:05 AM – 12:00 PM	***Keynote Speaker – Capital Markets & Economic Update*** **Liz Ann Sonders** Senior Vice President, Chief Investment Strategist, Charles Schwab & Co., Inc.
12:00 – 1:00 PM	**Lunch**
1:00 – 2:00 PM	***Chief Investment Officer Panel*** **Jean LaTorre,** CIO**,** Aetna **David Holmgren,** CIO**,** Hartford Healthcare *Moderator:* **Mike Chase**, Partner & Senior Consultant
2:00 – 3:00 PM	***Yes You Can!*** **Dick Hoyt** Team Hoyt *The remarkable story of a father's devotion to his wheelchair-bound son and how their bond inspired millions of people worldwide.*
3:00 – 3:15 PM	**15 Minute Break**
3:15 – 3:30 PM	***FIA State of the Firm*** Mark Wetzel, President
3:30 – 4:30 PM	***5 Ways Technology Will Change How You Age*** **John Diehl, CFP®, CLU®, ChFC®** Senior Vice President, Strategic Markets, Hartford Funds MIT AgeLab *A multidisciplinary research program that works with business, government, and NGOs to improve the quality of life of older people and those who care for them.*

Please join us for an evening reception at the **Mark Twain House & Museum**
351 Farmington Avenue, Hartford, 6:00 PM – 9:00 PM
Shuttle buses departing the Hartford Marriott at 5:30 PM & 6:00 PM, returning 8:30 PM & 9:00 PM

Friday, September 21, 2018

Breakout Sessions
8:30 AM – 11:30 AM

Participant Engagement Through Technology
(8:30 – 10:00 AM)

Akhil Nigam
Head of Emerging Products
Fidelity Investments

Peter Kapinos
Vice President, Head of Advisor, Sponsor & Investment Marketing
Empower Retirement

Craig Gross
Client Consulting Business Leader
Participant Education
Vanguard Institutional Investor Group

Moderator: Greg Adams, ChFC®
Consultant

Municipal Defined Contribution Plans
(8:30 – 10:00 AM)

Bruce Barth
Partner
Robinson & Cole LLP

Tyler Polk
Partner & Senior Consultant
Fiduciary Investment Advisors

Gary Conrad
Finance Director
Town of Westport, CT

Moderator: Chris Rowlins
Managing Partner & Sr. Consultant

15 Minute Break

How to Incorporate Responsible Investing & ESG (Environmental, Social & Governance) Into Your Portfolio
(10:15 – 11:30 AM)

Marcus Axthelm
Senior Portfolio Manager and Vice President
Dimensional Fund Advisors

Heidi Vanni
Managing Director
Walden Asset Management

Tim Coffin
Director of Sustainability
Breckinridge Capital Advisors

Moderator: Matt Kaminski, CFA
Partner & Director, Manager Research

401(k)/403(b) Mock Deposition: How to Protect Against & Prepare for Defined Contribution Litigation
(10:15 – 11:30 AM)

Ryan Gardner
Managing Partner &
Senior Consultant
Fiduciary Investment Advisors

Eric Altholz
Partner
Verrill Dana LLP

Michael K. Isenman
Partner
Goodwin Procter LLP

Moderator: Leslie Whitney
Senior Consultant

Lunch

Nonprofit Educational Symposium
8:30 AM – 12:00 PM

Governance in the Nonprofit Sector
(8:30 – 10:45 AM)

Chuck V. Loring, MBA, CFRE
Senior Partner
Loring, Sternberg, & Assoc.

Topics to be covered include:
- Trends impacting governance in the nonprofit sector
- Stages of board evolution that impact board performance
- Why there is a difference between volunteering and governance
- Legal obligations of nonprofit board members
- Best practices surrounding board roles and responsibilities
- Effective board structure and operations
- Intentional year-round board recruitment

15 Minute Break

Family Governance & Charitable Giving
(11:00 – 12:00 PM)

Stephanie Diamond
Managing Director, Charitable Planning Strategies
Charles Schwab

Lisa Newfield
Partner
Murtha Cullina

Eileen Foley Allgrove, JD, MST, CFP®
Associate Director, Private Client Group
Fiduciary Investment Advisors

Moderator: Andrew Salak
Associate Director, Private Client Group

Lunch