AGENDA

MONDAY, APRIL 29, 2019

1:30-2:25 p.m.   *Registration*

2:30-2:35 p.m.   **Welcome by Kathryn Morrison, SunStar Strategic CEO**

2:40-3:40 p.m.   **Beating the Big Guys - How to Attract Assets as an Active Boutique Manager**
Warren Miller, CEO, Flowspring

3:45-4:30 p.m.   **Inside the Media with Financial Journalists**
Beverly Goodman, Barron's
Jennifer Schonberger, Fox Business Network
John Waggoner, Kiplinger's Personal Finance
Moderator: Melissa Murphy

4:30-4:45 p.m.   *Break sponsored by Cohen & Company*

4:50-5:45 p.m.   **Success on BD Platforms**
Ryan Tagal, Envestnet | PMC
Moderator: Dave Carson, Ultimus Fund Solutions

6-8 p.m.   *Reception in the Glover Park Ballroom sponsored by U.S. Bank Global Fund Services*

TUESDAY, APRIL 30, 2019

7-7:40 a.m.	*Breakfast sponsored by Ultimus Fund Solutions*

7:45-8 a.m. **Opening remarks by Kathryn Morrison, SunStar Strategic**

8-8:55 a.m. **Case Studies**
> Jennifer Ashlock, Tortoise
> Devon Ramirez, Akre Funds
> Moderator: Andrew Strnad, U.S. Bank Global Fund Services

9-9:55 a.m. **Proven Growth Strategies**
> Carl Hendley, Motley Fool Asset Management
> Ben Jones, BMO Global Asset Management
> Tom Plumb, Plumb Funds
> Moderator: Jillian Bosmann, Drinker Biddle & Reath LLP

10-10:15 a.m. *Break sponsored by Berkshire Global Advisors*

10:15-11:10 a.m. **Distribution Essentials for Boutique Firms**
> Christopher Davis, Strategic Insight

11:15-12:10 p.m. **Advisor Outreach Ecosystem**
> David Finkelstein, Vivaldi Asset Management
> Ben Jones, BMO Global Asset Management
> Moderator: Matt Franey, Celera

12:10-12:30 p.m. *Break on your own*

12:30-1:25 p.m. *Lunch sponsored by Hennessy Funds*

1:30-2:25 p.m. **Digital Marketing Strategies**
> Shane Ryan, Hubspot
> Brian Tietje, LinkedIn
> Moderator: Marilyn Dale, SunStar

2:30-2:45 p.m. *Break sponsored by SalesStation (Celera Systems)*

2:45-3:45 p.m. **Trends in M&A for Funds**
> Bruce Cameron, Berkshire Global Advisors
> Brad Hearsh, UBS Investment Bank
> Neil Hennessy, Hennessy Funds
> Moderator: Chris Bellamy, Cohen & Company

3:50-4 p.m. **Closing remarks by Kathryn Morrison, SunStar Strategic**