The M Resort
12300 Las Vegas Blvd. S
Henderson, NV 89044

WEALTHWATCH
ADVISORS

THE ULTIMATE ADVISOR TRAINING & COMPLIANCE CONFERENCE

LAS VEGAS | NOVEMBER 4–6, 2020

Wednesday Nov 4

6–8PM **Welcome Happy Hour**

Thursday Nov 5

8–8:30AM **Registration**

8:30–8:45AM **Firm Overview & Goals for This Event**
David Shields, CEO—Wealth Watch Advisors

8:45–9:45AM **Howard Capital Management Buy-Line Technology & Private Wealth Services**
Vance Howard, CEO—Howard Capital Management

HOWARD Capital Management

9:45–10:30AM **First Trust—ETFs & Structure Notes**
Tim Daniel & Andrew Hull, VP—First Trust

10:30–10:45AM **Morning Break**

First Trust

10:45–11:30AM **Tax Planning for Small Businesses—Case Study**
Jeremy Lindsey, EA—Lindsey Financial, Inc.

11:30AM–12PM **Preset 401K Appointments from The Warton Group**
Gordon Tonnessen, COO—The Warton Group

THE WARTON GROUP, LLC

12–1PM **Lunch Break**

LifeArc

1–2PM **Simplify & Secure the Intake Process for New Clients with LifeArc**
Mike Wallin, CFP—Financial Architects & Consultants, LLC

RETIRE RIGHT me™

2–2:45PM **Retire Me Right Seminars—How We're Filling Events & Driving in $1M+ per Month in AUM**
Patrick Lynch, CEO—Patrick Lynch Financial

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Thursday Nov 5 Cont'd

2:45–3:30PM — **Horizon Investments—How Providing Goals-Based Investment Solutions Can Enhance Your Business**
Scott Egner, CIMA, CPWA, Practice Leader—Horizon One

3:30–3:45PM — **Break**

3:45–4:30PM — **SmartRIA Overview**
Casey Eitler, Director of Operations—Wealth Watch Advisors

4:30–5:30PM — **401K Guardian Lead Generation System**
Paul Spurlock—401K Guardian, LLC

Friday Nov 6

8–9AM — **Compliance Review to Protect Your Practice**
Bill Gastl, COO—Wealth Watch Advisors

9–9:45AM — **Taiber Kosmala—Right Trend Investment Models**
Phil Kosmala, CFA—Co-Founder of Taiber Kosmala, Inc.

9:45AM–10:30AM — **Fusion Elements—New Functionality to Simplify Your Business**
Ryan Borer, President—Fusion Capital Management

10:30–10:45AM — **Break**

10:45–11:15AM — **Brookmont Capital Management Overview**
Thurman Kelley, Manager of Investor Relations
—Brookmont Capital Management

11:15–11:45AM — **Using SIPS Income Planning Software to Close More Business**
Kyle Davis, Financial Analyst—Wealth Watch Advisors

11:45AM–12PM — **Wrap Up—Next Steps**
David Shields, CEO—Wealth Watch Advisors

HORIZON INVESTMENTS

SmartRIA

401K GUARDIAN

TAIBERKOSMALA

FUSION CAPITAL MANAGEMENT

BROOKMONT CAPITAL MANAGEMENT