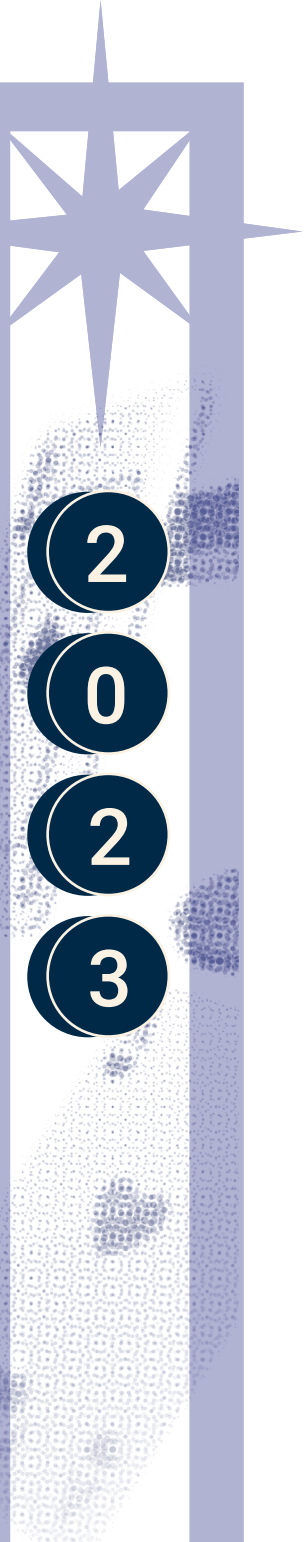




MOMENTUM

EVENT 2023 | RESORTS WORLD - LAS VEGAS

Prepare to be **challenged, inspired** and **equipped** at this year's Momentum Summit. Plan on arriving between noon and 6:00 PM. Visit the Resorts World reception desk to complete guest check-in.



23

WED

Happy Hour Welcome

Enjoy drinks, hors d'oeuvres, live music and great conversations.
(Lily Meeting Room)

6:00 PM - 8:00 PM

24

THUR

Breakfast Buffet
(Lotus Meeting Rooms 3 & 4)

7:00 AM - 8:00 AM

Registration and Welcome
(Lotus Meeting Rooms 1 & 2)

8:00 AM - 8:15 AM

WWA Introductions, Highlights & Top Advisors Recognition
David Shields, CEO WWA

8:15 AM - 8:30 AM

How I Went From Zero To \$1 Billion In 5 Years
Brian Gally, SVP - First Trust
Head of Strategy and Consulting

8:30 AM - 9:30 AM

Morning Break

9:30 AM - 9:45 AM

Focused Group Breakouts
Full list of participating Presentations continued on pg. 2
(Lotus Meeting Rooms 3 & 4)

9:45 AM - 12:15 PM



MOMENTUM

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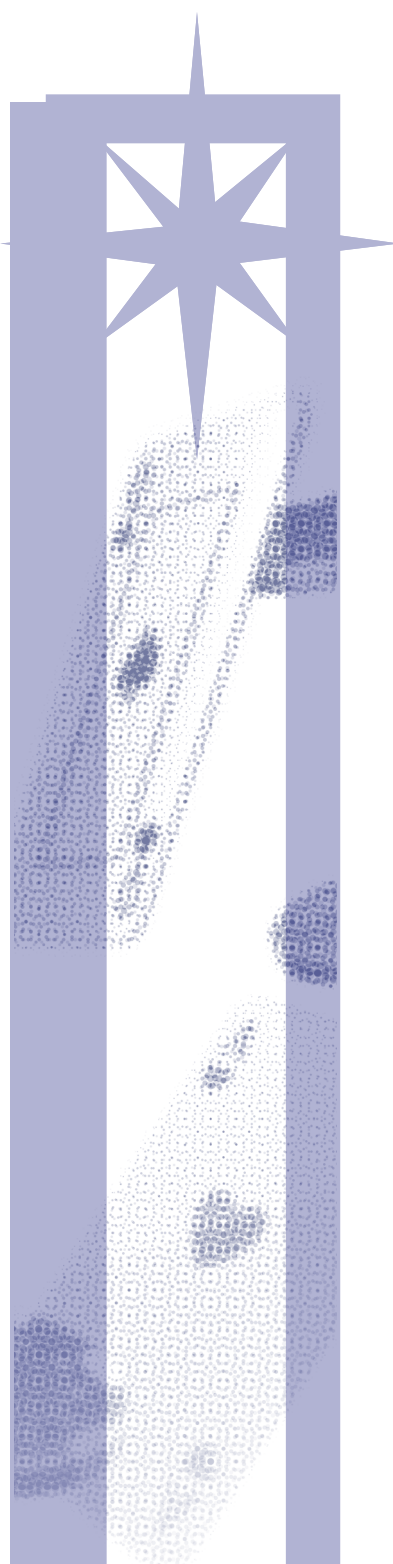
THUR

**Presentations
Focused Group Breakouts**

9:45 AM - 12:15 PM

- 1. ZEGA Financial**
Michael W. Puck, CRPC®
Director of Business Development
- 2. Principal- Scholar's Edge 529 Plans**
Joseph Friedman, CFP
529 Specialist - Principal
- 3. Nationwide Insurance Company**
Kevin Unterbrink
Divisional President
Casey Abbott
Regional Vice President
- 4. Howard Capital Management**
Dan Hornbaker
Regional Vice President
RQ Swann
Regional Wholesaler
- 5. Taiber Kosmala**
Phil Kosmala
Managing Partner
- 6. Fusion Capital Management**
Ryan Borer
President
- 7. First Trust - Direct Indexing**
Matt Parker, Vice President
ETF & SMA Specialist
- 8. 401 GO**
Dan Beck
CEO, Co-founder
- 9. FFE Foundation for Fiduciary Education**
Rick McClanahan
CEO of FFE
- 10. Wealth Watch Advisors- Client Intake Software**
Casey Ryder, Miriam Schafer
Operations Team
- 11. Legacy Marketing Group**
James Markoe
Regional Sales Manager
Dominic Cursio
National Sales Leader
- 12. First Trust - Structured Notes**
Michael Ratay
VP Structured Notes
- 13. LifeArc Software**
Mike Wallin
President
- 14. Tax Tech Hotline**
John Kamm
President

AUG 24th CONT





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24

THUR

Lunch
(Lotus Meeting Rooms 3 & 4)

12:30 PM - 1:30 PM

**Virtual Apex Advisors -
Owning the Virtual Market**
Al Caicedo & Aaron Domino

1:30 PM - 2:15 PM

First Trust Structured Notes
Michael Ratay, VP Structured Notes
First Trust

2:15 PM - 3:00 PM

WWA Mastermind Kickoff
James Jurica, Director of
Advisor Development

3:00 PM - 3:15 PM

Evening Free

3:15 PM

25

FRI

Breakfast Buffet
(Lotus Meeting Rooms 3 & 4)

7:00 AM - 8:30 AM

Market Analysis & Overview
Phil Kosmala, Managing Partner at
Taiber Kosmala

8:30 AM - 9:15 AM

Fusion Elements- Updates
Ryan Borer, President of Fusion
Management

9:15 AM - 9:45 AM

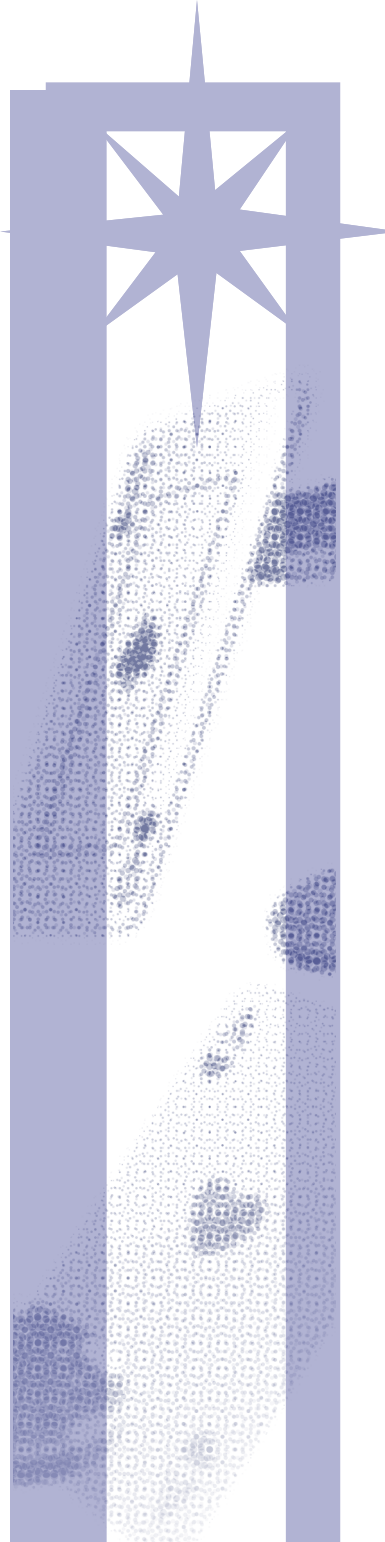
Morning Break

9:45 AM - 10:00 AM

**401GO- Advisor-Led
Retirement Solutions**
Dan Beck, CEO, Co-founder

10:00 AM - 10:45 AM

AUG 25th CONT





Wealth Watch Advisors

AUGUST 23rd - 25th

MOMENTUM

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FRI

TDA to Schwab Conversion Update
Casey Ryder, Director of Operations,
WWA

10:45 AM - 11:15 AM

Momentum Event Closing Remarks
Bill Gastl, COO - WWA

11:15 AM - 11:30 AM

Event Conclusion

11:30 AM

