



MOMENTUM

EVENT 2024 | 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.



02

WED

Happy Hour - Welcome

Enjoy drinks, hors d'oeuvres, entertainment and great conversations.

**RedTail Sportsbar -
The District at Resorts World**

6:00 PM - 8:00 PM

03

THUR

Breakfast Buffet Lotus Room 9 & 10

7:00 AM - 8:00 AM

Registration and Welcome Lotus Room 1 & 2

8:00 AM - 8:15 AM

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

8:15 AM - 8:30 AM

Modern Marketing: Activating the Power of People and Education with the 4 C's

Jackie Wilke - First Trust
VP, Advisor Consulting

8:30 AM - 9:15 AM

Morning Break 1

9:15 AM - 9:30 AM



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03

THUR

Table Talk

Discussion Groups

Full list of participating presenters

Lotus Room 3 & 4

9:30 AM - 11:00 AM

1. ZEGA Financial

Michael W. Puck, CRPC®
Director of Business Development

2. Bitwise

Ryan McKean
Ryan Rasmussen

3. Howard Capital Management

Dan Hornbaker
Regional Vice President
RQ Swann
Regional Wholesaler

4. Taiber Kosmala

Phil Kosmala
Managing Partner

5. First Trust - Model Updates

Matt Parker, Vice President
ETF & SMA Specialist

6. J.P Morgan Structured Investments

Shane Meyer
Executive Director

7. Legacy Marketing Group

John Terry
Special Projects
Sales Director

8. First Trust - Structured Notes

Michael Ratay
VP Structured Notes

9. APEX Digital Marketing

Al Caicedo &
Aaron Domino

10. Direxion

Tom Nguyen
VP Institutional ETFs

11. 401GO

Karli Maughan
Regional VP

12. Brooklyn Management Group

Alan Grissom
Markus Aakko

13. DACFP Digital Asset Council of Financial Professionals

Don Friedman
President

14. Bonaventure Capital

Anthony Sherlag
Regional VP

Stay tuned for more exciting presenters to be announced soon.





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THUR

Morning Break 2 11:00 AM - 11:15 AM

Direct Indexing Platform Overview 11:15 AM - 11:45 PM
Brooklyn Management Group
Markus Aakko & Alan Grissom

Lunch 11:45 AM - 12:45 PM
Lotus Room 9 & 10

First Trust - Market Update 12:45 PM - 1:15 PM
Bryce Gill, First Trust Economist

Table Talk Discussions Cont. 1:15 PM - 2:15 PM
Full list of participating presenters
on pg. 2
Lotus Room 3 & 4

Break 2:15 PM - 2:30 PM

Bitwise 2:30 PM - 3:00 PM
Ryan McKean & Ryan Rasmussen

Crypto Panel Q&A 3:00 PM - 3:45 PM
Ryan McKean- Bitwise
Ryan Rasmussen - Bitwise
Don Friedman - DACFP
Phil Kasmala - Taiber Kosmala
Bill Gastl - WWA

Evening Free 3:45 PM



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FRI

Breakfast Buffet Lotus Room 9 & 10	7:00 AM - 8:00 AM
Market Analysis & Overview Phil Kosmala, Managing Partner at Taiber Kosmala	8:00 AM - 8:45 AM
Legacy Marketing John Terry, Special Projects Sales Director	8:45 AM - 9:15 AM
Operations Team - WWA Updates Casey Ryder, Director of Operations, WWA	9:15 AM - 9:30 AM
Zega Mike Puck, Director of Business Development	9:30 AM - 10:00 AM
Morning Break	10:00 AM - 10:15 AM
Virtual Apex Advisors Al Caicedo & Aaron Domino	10:15 AM - 10:45 AM
Model Comparison Tool and New WWA models James Jurica & Bill Gastl	10:45 AM - 11:45 AM
Momentum Event Closing Remarks James Jurica, Director of Advisor Development	11:45 AM - 12:00 PM
Event Conclusion	12:00 PM

