

Agenda

Wednesday, February 12, 2020

Location: Room 103C, Long Beach Convention Center

8 – 8:30 a.m.

Networking and Breakfast

8:30 – 9:30 a.m.

**Keynote Panel: A Conversation about the Future –
How AI, Blockchain, Cybersecurity, and Robots Will
Transform Financial Services**

- Joel Bruckenstein, Founder, Technology Tools for Today (T3)
- Tim Welsh, President, Nexus Strategy, LLC
- Panel Session Moderated by Ryan Neal, Technology Reporter, *InvestmentNews*

9:45 – 10:45 a.m.

**Create an Outstanding Client Experience through
Operational Excellence with Smart Workflows**

- Vibhaw Arya, Chief Operating Officer, Shufro Rose
- Morgan Wheeler, Assistant Vice President, Farmer & Merchants Bank
- Panel Session Moderated by *WealthManagement.com*

11 a.m. – 12 p.m.

**Keynote – General Session, Featuring Guy Kawasaki,
former Chief Evangelist at Apple (Pacific Ballroom)**

12 – 1:30 p.m.

Lunch and Networking (Exhibit Hall A)

1:30 – 2:30 p.m.

Laserfiche Product Roadmap for Financial Services

- CRM integration, RPA and Secure File Share – Justin Pava, Principal Technical Product Manager
- Laserfiche Vault – Linda Ding, Director of Strategic Marketing, Laserfiche
- Facilitator: Tim Welsh, President, Nexus Strategy, LLC

2:45 – 3:45 p.m.

The Importance of the Customer Journey in Creating an Outstanding Client Experience (CX)

- Tim Welsh, President, Nexus Strategy, LLC
- Chad Christensen, Chief Compliance Officer, Semper Augustus Investment
- Patrick Welsch, President, CDI
- Moderator: Amy Flourry, Director of Operations, Rehmann Financial

4 – 5 p.m.

Financial Services Leadership Symposium Networking