

TUESDAY, SEPTEMBER 20, 2022

9:00 AM – 5:00 PM	Registration Opens	Grand Foyer
9:30 AM – 11:30 AM	IPA Rising Leaders Council Meeting (Invitation Only)	Grand Hall A
11:30 AM – 12:30 PM	Due Diligence Symposium Lunch (Attendees: Broker-Dealers, RIAs, and Presenting Sponsors Only)	Grand Hall C
11:45 AM – 12:45 PM	IPA Board of Directors & Rising Leaders Lunch (Invitation Only)	Brickyard AB
12:30 PM – 4:45 PM	Due Diligence Sessions (Attendees: Broker-Dealers, RIAs, and Presenting Sponsors Only)	Level 3
1:00 PM – 5:00 PM	IPA Board of Directors Meeting (Invitation Only)	Grand Hall B
3:00 PM – 4:45 PM	National Accounts Working Group (National Account Managers) <i>Angela Barbera</i> Managing Director, National Accounts, NexPoint <i>Joanna Venetch</i> Founder and Principal, Hana Solutions LLC <i>Michelle Moore</i> Vice President, Sales & Distribution, Ecovest Capital	Grand Hall A
5:15 PM - 5:30 PM	Welcome & Opening Remarks <i>Anya Coverman</i> President & CEO, Institute for Portfolio Alternatives	Grand Hall DE
5:30 PM – 6:15 PM	General Session: Economic Outlook and Alternative Investing As the world is still emerging from the worst of the pandemic, gas prices are at their all-time high. Food prices are rising the fastest in 42 years. Inflation and interest rates are on everyone's minds. Economists are predicting a risk of stagflation or potential recession. Our panel of experts will discuss these critical economic headwinds along with recent geopolitical events from lockdowns in China and Russia's invasion of Ukraine further disrupting global supply chains and increasing the potential for economic and humanitarian crises. How long will this last? What are the short term and long term impacts of rapid inflation on the economy? What opportunities are there for alternative investments to help investors weather the storm? How will this influence your business? Our panel of experts will dig into these critical macro and micro economic questions and the value of alternatives. <i>Lara Rhame</i> Chief U.S. Economist + Managing Director, FS Investments <i>Kelly Whitman</i> Executive Director, PGIM Real Estate <i>Kristina Hooper</i> Chief Global Market Strategist, Invesco <i>Joe Burns</i> Managing Director, Sales & Distribution, iCapital	Grand Hall DE
6:45 PM – 7:15 PM	Transfers to Opening Reception	Grand Hyatt Nashville: Lobby
7:00 PM – 9:30 PM	Opening Network Reception: A Night Out in Nashville - Sponsored by Blackstone, iCapital and Realized	Acme Feed & Seed

WEDNESDAY, SEPTEMBER 21, 2022

8:00 AM - 9:00 AM	Government Affairs & Compliance Committee Breakfast Meeting	Rail Yard ABC (Level 4 Meeting Space)
8:00 AM - 9:00 AM	Diversity, Equity & Inclusion Committee Breakfast Meeting	Interchange (Level 2 Meeting Space)
9:15 AM – 10:15 AM	General Session: PDI Capital Markets – 2022 Review <i>Kevin Gannon</i> Chairman & CEO, Robert A. Stanger & Co., Inc. <i>Mike Kell</i> SVP, Education Strategy and Programs, iCapital <i>Taylor Garrett</i> President, Orchard Securities/Mountain Dell Consulting	Grand Hall DE

WEDNESDAY, SEPTEMBER 21, 2022 (CONT'D)

10:15 AM – 10:45 AM	Networking Break & Exhibits	Grand Foyer
10:45 AM – 11:30 AM	General Session: View from the C-Suites <p>This session will take an intimate look at what may play out as the world continues to emerge from the global pandemic, economic challenges, and an ever changing geopolitical environment. Industry thought leaders, who sit in C-level positions, will offer critical insights in how our current environment effects their outlook and will explore potential opportunities and obstacles that may emerge and the foreseeable impact on alternative investment strategies in 2022 and beyond.</p> <p>Perrin Quarshie <i>Founder and CEO, RealBlocks</i> Robert Collins <i>Partner, Partners Group</i> Alan Clifton <i>Chief Investment Officer, PASSCO</i> Howard Margolis <i>Chief Operating Officer, Franklin Templeton Wealth Management Alternatives Distribution Group</i></p>	Grand Hall DE
11:30 AM – 12:15 PM	General Session: Regulatory Trends and Legislative Outlook <p>Hear the latest from regulatory and legislative experts on the current topics and trends they are seeing in the financial services industry and the impact on investors and firms. Panelists will address recent and anticipated activities impacting real estate, public and private credit and other real assets from federal and state regulators, including the U.S. Securities and Exchange Commission (SEC), the Financial Industry Regulatory Authority (FINRA), the U.S. Department of Labor (DOL), and the North American Securities Administrators Association (NASAA). Learn about the recent NASAA REIT proposal, other proposed rulemaking, regulatory enforcement priorities, and examination focuses. In addition, listen to the latest updates on the Congressional mid-term elections, as well as tax, retirement and financial services legislation impacting the portfolio diversifying investments industry.</p> <p>Gina Gombar <i>VP, Government Affairs and Associate General Counsel, Institute for Portfolio Alternatives</i> Thomas Selman <i>Founder, SCOPUS Financial Group</i> Doyle Bartlett <i>Managing Shareholder, Washington DC, GrayRobinson, P.A.</i> A. Valerie Mirko <i>Partner, Baker McKenzie LLP</i> Kevin Walsh <i>Principal, Groom Law Group</i></p>	Grand Hall DE
12:15 PM – 1:15 PM	Networking Lunch & Exhibits	Grand Hall ABC / Grand Foyer
1:15 PM – 2:45 PM	Strategic Working Groups	Meeting Level 4
2:45 PM – 3:30 PM	Networking Break & Exhibits	Grand Foyer
3:30 PM – 4:15 PM	Strategic Working Group Debrief	Grand Hall DE
4:15 PM – 5:00 PM	General Session: Beyond the Image of Diversity - Integrating Inclusion into the Changing Workplace <p>Why is DEI (Diversity, Equity & Inclusion) important to our industry? Creating a culture of inclusion is no longer simply “a nice to have.” Instead, it is essential for recruiting, engaging, and retaining top talent, which will allow employees to share unique perspectives and reach their full potential without barriers. As a result, this increases the competitive advantage of the organization. We must look for opportunities to help the IPA and its members sustain their core values and build a culture of inclusion.</p> <p>Deborah Froling <i>Partner, Kutak Rock LLP</i> Trisha Miller <i>Executive Managing Director, Capital Markets, Redbrick LMD, LLC</i> Jonathan Simon <i>Global Head of Leadership Development and Diversity, Equity, and Inclusion, Apollo Global Management, LLC select</i> Michelle Morris <i>Executive Director, Morgan Stanley Wealth Management Investment Solutions</i></p>	Grand Hall DE
5:00 PM - 5:15 PM	Awards Ceremony <p>Anya Coverman <i>President & CEO, Institute for Portfolio Alternatives</i> Matt Fries <i>Head of Due Diligence, Cetera Financial Group</i></p>	Grand Hall DE
5:15 PM – 6:30 PM	Networking Reception - Sponsored By Mediant, RealBlocks, Trilogy Real Estate Group	Grand Hyatt Nashville: Pool Deck

WEDNESDAY, SEPTEMBER 21, 2022 (CONT'D)

7:00 PM – 8:00 PM

Optional Dine-a-rounds

Offsite

THURSDAY, SEPTEMBER 22, 2022

7:30 AM - 8:30 AM

Industry Products Committee Breakfast Meeting

Rail Yard ABC

7:30 AM - 8:30 AM

Technology, Innovation and Operations Committee

Interchange (Level 2 Meeting Space)

7:30 AM - 8:30 AM

Networking Breakfast & Exhibits

Grand Hall ABC / Grand Foyer

8:45 AM - 9:30 AM

General Session: RIA Insight: Understanding How to Work with RIAs

In this panel, you will hear from RIAs, and those who work within the RIA marketplace, to gain insight into how this unique distribution channel prefers to utilize alternative investments. This very distinctive group of investment professionals has a growing appetite for portfolio diversifying investments and, in this session, we can begin to understand how to engage and interact with them to maximize success with this ever growing and idiosyncratic part of our industry.

Clint Sorenson *Founder, WealthShield*

Charles Brokop *President, Clear Stream Advisors*

Richard Hillson *Founder, Hillson Consulting*

William Parsons *Managing Member, Mainsail Asset Management, LLC*

Grand Hall DE

9:30 AM – 10:15 AM

General Session: Analyzing Alternative Investment Structures

One of the most critical decisions a firm can make is what type of alternative investment structure to distribute. In this panel we will look at the attributes of the many types of portfolios diversifying structures, their strengths and how they fit into the larger picture of your firms goals. As we analyze these investments, we will also look at what sort of regulatory, marketing or distribution challenges might come along with them.

Andrew Snyder *Director | Product & Research, CAIS*

Michael Gordon *Executive Director, J.P. Morgan Asset Management*

Jake Heidkamp *Co-President, Principal, FactRight, LLC*

Scott Reeder *Managing Director, BlackRock*

Grand Hall DE

10:30 AM – 1:15 PM

Due Diligence Sessions (Attendees: Broker-Dealers, RIAs, and Presenting Sponsors Only)

Level 3

12:30 PM – 1:15 PM

Due Diligence Lunch (Attendees: Broker-Dealers, RIAs, and Presenting Sponsors Only)

Level 3 Foyer