



Keynote Speakers

Monday, July 26,
4:00 p.m. – 5:15 p.m.

OPENING GENERAL SESSION

Ready for Action: Committing to Diversity and Inclusion

One of the best ways to ensure access to professional financial advice for all Americans is to grow our industry to reflect a broader range of perspectives and cultures. Bringing together people of varying experiences and backgrounds promotes an enhanced environment filled with an array of fresh ideas for the benefit of our clients, our firms and our industry.

Although shifting to new paradigms can be difficult to navigate, change is imperative for a successful and sustainable business. How can you walk the walk with the future in mind? It will take planning, listening, a lot of conversations, and courageous commitment.

We're inviting you to take this journey with us! Dale Brown will share FSI's vision and personal commitment to diversity and inclusion.

As a CFP® professional, business owner, DEI Strategist, and non-profit leader, Lazetta Rainey Braxton galvanizes C-Suite executives, financial professionals, and the next generation of leaders to greater awareness and action. Her mantra is financial planning is truly for everyone. Lazetta will outline key tools and processes for helping individuals and firms stay relevant in an increasingly diverse environment.

Co-Presenters:



Dale E. Brown, CAE, President & CEO, Financial Services Institute



Lazetta Rainey Braxton, MBA, CFP®, Co-Founder and Co-CEO of 2050 Wealth Partners and Founder and CEO of Lazetta & Associates

Tuesday, July 27
11:00 a.m. – 12:00 p.m.

GENERAL SESSION

The Future Economy: Opportunities for Growth

The world will see more economic change in the next five years than anyone has seen in the last 100. Beginning this year, trends super-charged by the pandemic will exert themselves on the economy. AI, robotics, ESG, cryptocurrency and online meetings and collaboration are just a few of the extraordinary tools businesses are leveraging now to meet challenges, adapt and thrive.

How are you preparing to align yourself with the future? Take your first steps with futurist and economist Andy Busch, who will dive deep into how innovation, policy change and societal shifts will drive opportunities for your clients and your business.

Come away with Andy's suggestions for running your business better today and transforming it for the years ahead.

Presenter:



*Andy Busch, Former Chief Market Intelligence Officer,
Commodities and Futures Trading Commission (CFTC)*

Tuesday, July 27
4:15 p.m. – 5:15 p.m.

**CLOSING GENERAL SESSION
FIRM EXECUTIVES PANEL**

The Post COVID World: Moving #ForwardTogether

Join our panel of leaders from firms across the country, both large and small, to process what the pandemic has meant for our industry, our firms and our lives.

Panelists will discuss changes made in response to COVID-19 and the differing effects by firm type. We'll delve into the issues, identifying opportunities and possible long-term benefits. Together, let's discover and share the silver linings and how we accomplished it all more quickly than ever imagined.

Panelists include:



Elizabeth "Libet" Anderson, President, ProEquities, Inc.



George Chuang, President & CEO, Transamerica Financial Advisors, Inc.



Jamie Price, President & CEO, Advisor Group



Moderator: Estee Faranda, CEO, PFS Investments, Inc.