CRAMER ROUNDTABLE SERIES

Leaders & Champions

December 5, 2024 | Fontainebleau Las Vegas

CRAMER & associates

JackCramer.com

AGENDA*

8:00am	**Opening Remarks & Introductions**	**Jack Cramer**
8:20am	**State of the Industry** - Cultivating Change - Advisor Experience - Partnering with Wealth	**Mike Cherny** – Citizens **Wallace Harris** – BMO **Sol Schmidt** – KeyBank
9:45am	**Strategy & Segmentation** - Recruiting and Retention - Managing Through Change - Building Your Team	**Frank Consalo** – Citi **Donna McNeely** – Kinecta Wealth **Mark Potter** – Commerce Financial Advisors **Doug Riccitelli** – Flagstar
10:25am	**Ask Anyone Anything**	**Open Forum**
11:15am	**All Things Product** - Product Trends - Indexes: Sentiment and Strategies - What's Making an Impact	**Dan Huth** – Truist **Raul Perez** – Wells Fargo Securities **Melissa Steiner** – Ameriprise Financial
11:45am	**Lunch**	
12:55pm	**Working with Partners** - Today's Wholesaling Environment - Importance of Service - Getting the Best Out of Partnerships	**Brett Carmichael** – Nationwide **Drew Farrell** – Symetra **Melissa Scheuerman** – Corebridge
2:10pm	**Ask Anyone Anything**	**Open Forum**
2:35pm	**Building a Successful Insurance Program** - Insurance Specialists - Product Mix - Financial Planning	**Bob Corsarie** – Fifth Third **Matt McAfee** – Wilmington Advisors @ M&T
3:30pm	**Behind the Curtain: Planning for 2025**	**Open Forum**
4:00pm	**Closing Remarks**	**Todd Nixon**

***Times may shift based on group engagement.**