

WELCOME TO **UNCOMPROMISED** **DWS**

DWS Conference Kick Off Wednesday, September 30

Round of Golf
at Rocky River Golf Club
at 1:00 PM



6900 Bruton Smith Blvd
Concord, NC 28027

Happy Hour
at Stir
at 6:00 PM



1422 S Tryon Street
Charlotte, NC 28203



Discipline
WEALTH SOLUTIONS

UNCOMPROMISED DWS

DAY ONE

8:00 AM

Registration & Breakfast

Check-in & Networking at Dimensional Fund Advisors

9:00 AM

Opening Remarks

Welcome & State of Union

9:20 AM

Marketing for Today's Advisor

Tom Lamendola & Matt Earhart

10:20 AM

Expand Client Services with Discipline Assured Solutions

Anthony Colancecco & Manuel Barrientos

11:05 AM

Break - 10 Minutes

11:15 PM

Financial Planning is a Sales & Service Process

Bryan Ballentine & Jordan Durham

12:15 PM

Lunch Time

Buffet lunch provided

1:00 PM

AI for Advisors

Simplicity Ops - Kate Guillen



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WEALTH SOLUTIONS

UNCOMPROMISED DWS

DAY ONE

1:45 PM

BucketWise - Every Dollar Has a Shelf Life™

Anthony Colancecco, Bryan Ballentine
& Sam Lacroce

2:30 PM

Break - 10 Minutes

2:45 PM

Adding VALUE Through LTC

Stahlnecker Wealth Management
Group - Brooks Stahlnecker

3:15 PM

Grow Your Business Through TSP

GTG Wealth Management, LLC -
Timothy Gambatese

3:45 PM

Break - 10 Minutes

4:00 PM

Indexing is a Series of Active Decisions

Dimensional Fund Advisors

4:45 PM

Keynote: Speed, Strength, and Consistency

Maddy Price, Olympic Track & Field Athlete

5:30 PM

Dinner

Fleming's Prime Steakhouse & Wine Bar
210 E Trade St Suite-110, Charlotte, NC
28202



Discipline
WEALTH SOLUTIONS

UNCOMPROMISED DWS

DAY TWO

8:00 AM

Registration & Breakfast

Check-in & Networking at Dimensional Fund Advisors

8:55 AM

Opening Remarks

Recap of Day 1

9:00 AM

Keynote: Becoming Necessary

Dr. Elko

9:45 AM

DWS Ops Best Practices & Enhancements

Terri Boyer & Logan Tillotson

10:45 AM

The Social Security Retirement Reckoning

HALO - Lee Moses

11:15 AM

Break - 10 Minutes

11:30 AM

Expand Your Practice with SDBAs

The Pilot's Advisor & Howard Capital Management - Ryan Fleming

12:00 PM

Mapping Your Retirement Runway

GILICO - Anthony Nizzi

12:30 PM

Closing Remarks

Anthony Colancecco & Bryan Ballentine

1:00 PM

Conference Ends & Boxed Lunch



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