

UNCOMPROMISED

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



at 6:00 PM

1422 S Tryon Street
Charlotte, NC 28203

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DAY ONE - Thursday, October 1

8:00 AM

Registration & Breakfast

Check-in & networking at Dimensional

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

11:05 AM

Break - 10 Minutes

11:15 PM

**Financial Planning - A Sales &
Service Process**

Bryan Ballentine

12:15 PM

Lunch Time

Buffet lunch provided

1:00 PM

AI for Advisors

Simplicity Ops - Kate Guillen

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DAY ONE - Thursday, October 1

1:45 PM

Bucket Wise - 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

Brooks Stahlnecker - Stahlnecker
Wealth Management Group

3:15 PM

Grow Your Business Through TSP

Timothy Gambatese - GTG Wealth
Management, LLC

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

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DAY TWO - Friday, October 2

8:00 AM

Registration & Breakfast

Check-in & networking at
Dimensional

8:55 AM

Opening Remarks

Recap of Day 1

9:00 AM

Keynote: Becoming Necessary

Dr. Elko

9:45 AM

DWS Ops Best Practice/Enhance Moments

Terri Boyer & Logan Tillotson

10:45 AM

The Social Security Retirement Reckoning

Lee Moses

11:15 AM

Break - 10 Minutes

11:30 AM

Expand Your Practice with SDBA's

Ryan Flemming - Pilot Advisors &
Howard Capital Management

12:00 PM

GILICO - Mapping Your Retirement Runway

Anthony Nizzi

12:45 PM

Closing Remarks

Anthony Colancecco & Bryan Ballentine

1:00 PM

Conference Ends & Box Lunch

Thank you to our sponsors

