



Discipline
WEALTH SOLUTIONS

Build, Scale, Exit.

Your Blueprint for Success.

(864)349-5553

info@dwshep.com

www.disciplinewealth.com

15 Halton Green Way, Greenville, SC 29609

Arrival

Tuesday, October 7th

WELCOME TO GREENVILLE

4:00 PM

Hotel Check-In

**Embassy Suites by
Hilton Greenville
Downtown Riverplace**

250 Riverplace,
Greenville, SC 29601

6:00 PM

Up On The Roof
Cocktail Reception -
Meet & Greet

(Hotel Roof Top Bar)

EXPLORING GREENVILLE

Falls Park on the Reedy
& Liberty Bridge

Swamp Rabbit Trail

Peace Center For
Performing Arts

Flour Field at the West
End

Restaurants:

Soby's
(*Modern Southern*)

Sassafras
(*Southern Bistro*)

Trappe Door
(*Belgian*)

Indaco
(*Italian, Wood-Fired*)

DAY ONE

Wednesday, October 8th

Rendezvous Ballroom 1

7:30 AM

Breakfast @ Ruth's Chris Dining Room

8:15 AM

Welcome & State of the Industry
- *DWS Team*

8:45 AM

The Small Business Playbook: How to
Grow Organically, Authentically, and
Intelligently in the Age of Digital Noise
- *Special Guest*

**9:45 AM
BREAK**

10:00 AM

Leveraging Long-Term Care to Win
More Assets
- *Financial Independence Group*

10:45 AM

Understanding Client Behavior and
Needs During Retirement Years
- *GILICO*

11:30 AM

Fuel Growth with Increased
Profitability & AUM
- *HALO Investing*

**12:00 PM
LUNCH**

12:45 PM

From Growth to Scale:
Integrating Retirement Plans
- *Sentinel Group*

1:30 PM

Everything You Need to
Grow & Scale Your
Business
- *Orion Tech Stack*

**2:15 PM
BREAK**

2:30 PM

Turning the Retirement Bucket
Strategy into Sales Success
- *DWS, Bryan Ballentine*

4:00 PM

The Client Perspective: How to Align
Your Services with Their
Expectations
- *Dimensional Fund Advisors*

END OF DAY

Please join us for dinner at
**Rendezvous Ballroom 2 at
6:30 pm** for a special evening
together!

DAY TWO

Thursday, October 9th

Rendezvous Ballroom 1

7:30 AM

Breakfast @ Ruth's Chris Dining Room

8:00 AM

Recap

8:15 AM

Turn DWS Marketing Content into
Sales Wins
- *DWS Marketing Team*

9:00 AM

To Simplify Operations, Elevate
Client Experience, & Create More
Freedom
- *Simplicity Ops & DWS*

10:00 AM

DWS Tech Deep Dive: Maximizing
Your Advisor Support Tools &
Bring in More AUM
- *DWS Team*

**10:45 AM
BREAK**

11:00 PM

Keynote Speaker: Help You
Maximize The Value of Your Practice
- *Exit Stage Left Advisors, Ted Jenkin*

12:00 PM

What's Next? Your Roadmap to
Growth with DWS

**12:15 PM
BOX LUNCHES**

Afternoon Activities

1. **Golf**
2. **Explore Greenville**
3. **One on One with DWS**





Discipline Wealth Solutions is an investment adviser registered with the Securities and Exchange Commission ("SEC"). See full disclosure [HERE](#)

