



The Kingswood Conference Series, Scottsdale
Scottsdale, Arizona

November 27th - 29th, 2023

Conference Agenda



Resort Map



Fairmont
SCOTSDALE PRINCESS

KEY LOCATIONS

- 1 Lobby
- 2 Front Desk
- 3 Bell Desk
- 4 Concierge/Golf Concierge
- 5 Car Rental
- 6 Ironwood Circle
- 7 Fragrance Garden
- 8 Fairmont Fitness Center*
- 9 FedEx Business Center

RESTAURANTS & LOUNGES

- 10 Bourbon Steak by Michael Mina
- 11 The Plaza Bar
- 12 La Hacienda by Richard Sandoval
- 13 The Social at Princess Pool
- 14 Sunset Beach Pool Bar
- 15 Ironwood American Kitchen*
- 16 Toro Latin Restaurant & Rum Bar at TPC

(Complimentary shuttle at front drive)

POOLS

- 17 Sonoran Splash Pool & Waterslides
- 18 Sonoran Landing Pool & Bar (18 & older)
- 19 Princess Pool & Jacuzzis
- 20 Privado Villas Pool & Jacuzzi
- 21 Sunset Beach Pool & Splash Pad
- 22 Well & Being Rooftop Pool (18 & older)

RECREATION & RETAIL

- 23 Provisions Coffee Shop & Retail
- 24 Market Anna J Women's Boutique
- 25 Maverick Menswear
- 26 Trailblazers Recreation Center*
- 27 Sport Court & Playground
- 28 Well & Being Spa | Sisley-Paris Spa
- 29 Well & Being Salon

MEETING SPACES

- 45 Copper Canyon Western Town
- 37 Palomino Ballroom & Conference Center
- 39 East Palomino Plaza

* = LOWER LEVEL E = ELEVATORS

Monday, November 27

4:00 - 6:00P	Registration Open North Palomino Foyer
6:00 - 7:00P	Welcome Reception Copper Canyon Western Town
7:00 - 9:00P	Welcome Dinner Copper Canyon Western Town <i>Sponsored by U.S. Energy Development Corporation</i>

Tuesday, November 28

All events take place in the Palomino Ballroom & Conference Center

8:00 - 9:00A	Breakfast
9:00 - 9:40A	Kingswood Opening Remarks <ul style="list-style-type: none">• Mike Nessim, Chief Executive Officer & Managing Partner• Val Peters Rayevskiy, Chief Operating Officer• Mike Alsoraimi, Chief Compliance Officer• Tyler Bashaw, Director of Compliance
9:45 - 10:00A	<i>Due Diligence for Alternative Investments</i> <ul style="list-style-type: none">• Jake Heidkamp. Co-President, FactRight LLC• Mat Dellorso, Co-Founder of WealthForge Securities
10:00 - 11:00A	<i>Alternative Investments in Commercial Real Estate</i> <ul style="list-style-type: none">• Kerry Peoples. SVP, Sealy Investment Securities LLC• Alex Anderson, Senior Director, Time Equities, Inc.• Russell Platt, Co-Founder & CEO, Forum Partners
11:00 - 11:15A	Coffee Break With the Sponsors

Tuesday, November 28

All events take place in the Palomino Ballroom & Conference Center

11:15A - 12:00P ***Alternative Investments in Residential Real Estate***

- Paul Garvin, VP of Business Development, Skyway Capital Markets
- Derek Peterson. SVP National Accounts, Megatel Capital Investment
- Andy Nerney. Managing Director, The True Life Companies

12:00P - 1:00P ***Lunch With the Sponsors***

1:00 - 1:30P ***Raymond James Presentation***

1:30 - 1:45P ***Opportunities in Life Insurance***

- James Tanksley. VP Annuity Sales, Tarkenton Financial

1:45 - 2:00P ***Opportunities in Annuities***

- Bryan Albert. Head of Sales, Eagle Life Insurance

2:00 - 3:00P ***Opportunities in Opportunity Zone Funds***

- Gary Laughlin. Regional VP, Shopoff Realty Investments
- Crystal Rutkowski, AIF®, Ambassador to the Strategic Partnerships Channel, Urban Catalyst
- Mike Haven. VP, U.S. Energy Development Corporation

3:00 - 3:15P ***Coffee Break With the Sponsors***

3:15 - 3:35P ***RBC Presentation***

Tuesday, November 28

All events take place in the Palomino Ballroom & Conference Center

3:35 - 3:45P	GeoWealth Presentation
3:45 - 4:00P	The Seven “Musts” of Advisor Marketing <ul style="list-style-type: none">• Douglas Heikkinen, Founder, Editor & Creative Director, Advisorpedia• Jakie Beard, VP of Marketing, Advisorpedia
4:00 - 5:00P	One-on-One Meetings
6:00 - 7:00P	Cocktail Reception in the Palomino Ballroom
7:00 - 9:00P	The President’s Dinner in the Palomino Ballroom

Wednesday, November 29

With the exception of the Wellness Hike, all events take place in the Palomino Ballroom & Conference Center

6:30 - 7:30A	Optional Wellness Hike Meet in the Main Lobby
8:00 - 9:00A	Breakfast
9:00 - 9:10A	Charitable Initiatives: Kingswood Cares <ul style="list-style-type: none">• Ashley Webb, Director of Operations & Registered Principal
9:10 - 9:30A	Kingswood Investment Banking <ul style="list-style-type: none">• Craig Kaufman, Managing Director, Kingswood Investments• Ed Tsuker. Chief Executive Officer, Kingswood Investments• Ariel Imas. President, Kingswood Investments

Wednesday, November 29

All events take place in the Palomino Ballroom & Conference Center

9:30 - 9:45A

Opportunities in Private Equity

- John Eckhard. Director of Sales, InvestX Capital

9:45 - 10:00A

Skyway Business Partnership

- Jeff Hunt, Managing Director, Skyway Capital Markets

10:00 - 10:45A

Covered Securities

- Kevin Kennedy, CIMA. Founding Partner, Chief Sales & Distribution Officer, Red Oak Capital Holdings, LLC
- Steven Nystrom, Vice President, CIM Group
- Chris Garcia, SVP, Eagle Point Credit

10:45 - 11:00A

Coffee Break With Sponsors

11:00A - 12:00P

Opportunities in Alternative Investments

- Jeff Young. VP of Capital Markets, Sovereign Partners
- Kyle Freda, CRPC®. Managing Director, Peachtree Group
- Hunter W. Allen, EVP, StratCap Securities

12:00 - 1:00P

Lunch With Sponsors

1:00 - 1:45P

Alternatives for Tax Mitigation

- Kayla Lien, National Accounts Analyst, Capital Square
- William Dressell. Founder & Managing Partner, STL Resources, LLC
- Corey Nolen, VP, Cove Capital Investments

Wednesday, November 29

All events take place in the Palomino Ballroom & Conference Center

1:45 - 3:00P	Alternative Assets <ul style="list-style-type: none">• Patrick Lam. President & National Sales Manager, Inspired Healthcare Capital• Griff Hoover, SVP, Tasty Brands II, a Triton Pacific Company• Bill Rack, Jr. SVP, Waveland Capital Partners• Jade Miller. President, Capital Markets, Bourne Financial Group, LLC
3:00 - 3:30P	Coffee and Snacks with Sponsors <ul style="list-style-type: none">• Sponsor Booths Open
3:30 - 3:50P	Building a Winning Business with AssetMark <ul style="list-style-type: none">• Aaron Jones, AIF, Senior Regional Consultant, AssetMark
3:50 - 4:00P	Closing Remarks <ul style="list-style-type: none">• Mike Nessim, Chief Executive Officer & Managing Partner
4:00 - 5:00P	One-on-One Meetings
5:00 - 7:00P	Free Time
7:00P	Dine Arounds With Sponsors

Thursday, November 30

All Day	Departures <p><i>Please see your registration packet for airport transfer information.</i></p>
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 **GEOWEALTH**

**We would like to thank the gorgeous
Fairmont Scottsdale Princess
for hosting the Kingswood Conference Series, Scottsdale**



***The Kingswood Conference Series - Scottsdale lives on -
Scan the QR Code to access presentations, attendee lists and more!***

Note: you must be registered & logged into our advisor resource intranet, welcometokingswood.com

