



The Kingswood Conference Series, Scottsdale  
Scottsdale, Arizona  
November 27th - 29th, 2023

*Conference Agenda*





# Resort Map



## 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  
*Sponsored by U.S. Energy Development Corporation*

## 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**
  - 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      ***Due Diligence for Alternative Investments***
  - Jake Heidkamp, Co-President, FactRight LLC
  - Mat Dellorso, Co-Founder of WealthForge Securities
- 10:00 - 11:00A      ***Alternative Investments in Commercial Real Estate***
  - 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

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

## Wednesday, November 29

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

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

# 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***

- 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***

- Sponsor Booths Open

3:30 - 3:50P

### ***Building a Winning Business with AssetMark***

- Aaron Jones, AIF, Senior Regional Consultant, AssetMark

3:50 - 4:00P

### ***Closing Remarks***

- Mike Nessim, Chief Executive Officer & Managing Partner

4:00 - 5:00P

### ***One-on-One Meetings***

5:00 - 7:00P

### ***Free Time***

7:00P

### ***Dine Arouds With Sponsors***

## Thursday, November 30

All Day

### ***Departures***

*Please see your registration packet for airport transfer information.*

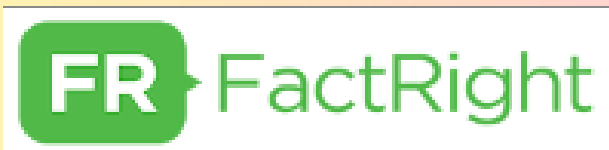
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*Fairmont*  
SCOTTSDALE PRINCESS



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