



THE KINGSWOOD CONFERENCE SERIES

Nashville

THE JW MARRIOTT, NASHVILLE
NOVEMBER 10TH - 13TH, 2024

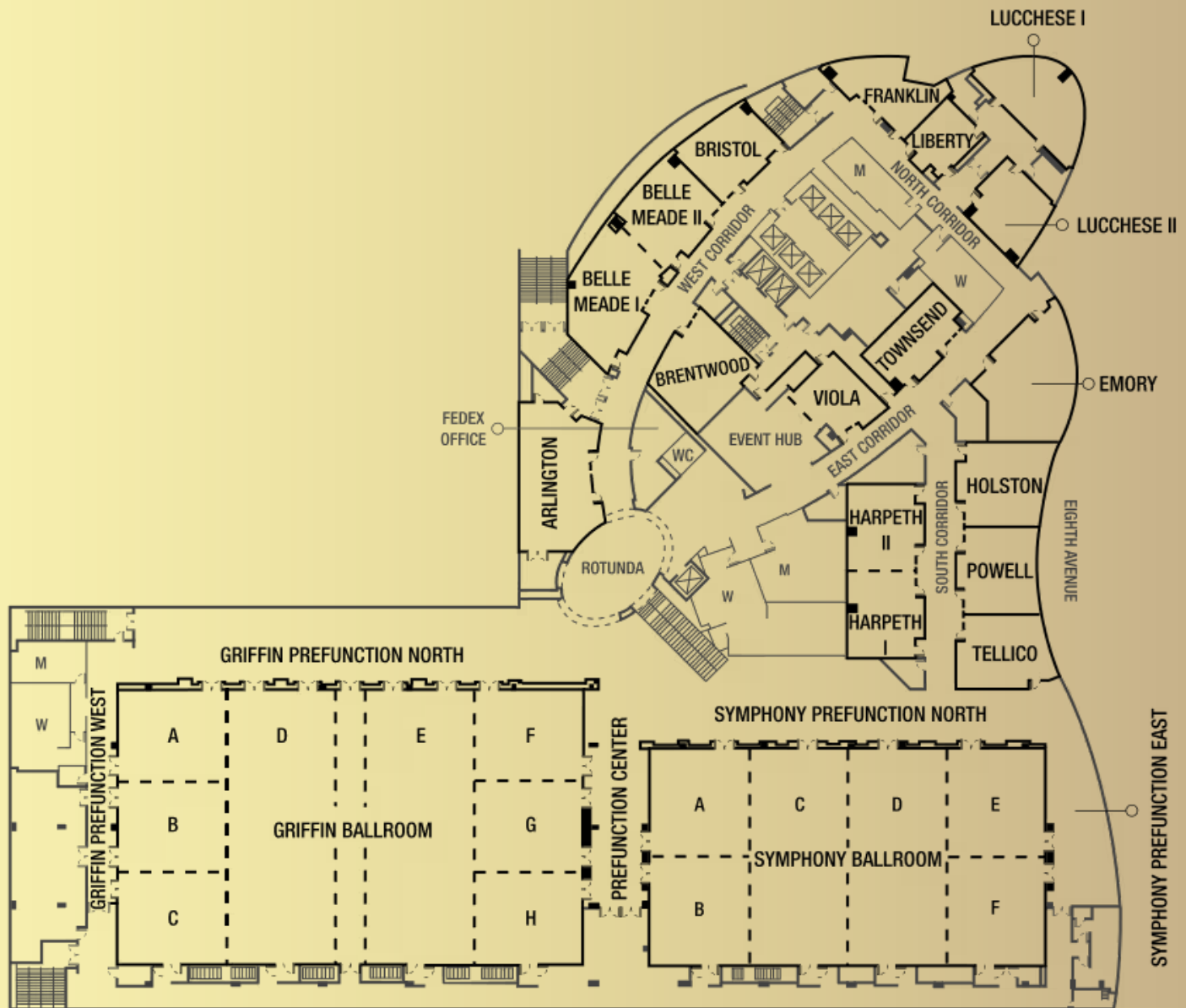
CONFERENCE AGENDA





JW MARRIOTT

MEETING ROOMS



*All events take place at the Symphony Ballroom. Breakfast will be served at Bourbon Steak on the 34th Floor.
Lunch will be served in the Exhibit Hall*

Sunday, November 10th

2:00 - 6:00P

Registration Desk Open

- *The Registration Desk will be open in the Symphony Ballroom Foyer. Please pick up your Name Badge and Welcome Package.*

6:00 - 7:00P

The Kingswood **Concert** Series, Nashville

- *The Symphony Ballroom*

7:00 - 9:00P

Welcome Dinner

- *The Symphony Ballroom*

Monday, November 11th

All events take place at the Symphony Ballroom. Breakfast will be served at Bourbon Steak on the 34th Floor. Lunch will be served in the Exhibit Hall.

8:00 - 9:00A

Breakfast with Sponsors

- *Bourbon Steak*

9:00 - 9:10A

Opening Remarks

- *Douglas Blake, Managing Director of Investment Solutions*

9:10 - 9:30A

Kingswood Town Hall

- *Mike Nessim, President and CEO*
- *Val Peters, Chief Operating Officer*

Monday, November 11th

All events take place at the Symphony Ballroom. Breakfast will be served at Bourbon Steak on the 34th Floor. Lunch will be served in the Exhibit Hall

9:30 - 9:45A

Investment Banking

- *John Reed, Head of Capital Markets*

9:45 - 10:30A

Alternative Investment Showcase

- *Megatel Capital Investment - 20 Minutes*
 - *Sovereign Partners - 10 Mins*
 - *Oxford Funds - 10 Mins*

10:30 - 11:00A

Coffee Break with Sponsors

- *Sponsor Booths Open*

11:00 - 11:15A

Overview of the Alternative Investment Platform

- *Douglas Blake, Managing Director of Investment Solutions*

11:15A - 12:00P

Tax Advantaged Alternatives

- *US Energy - 20 Mins*
 - *Cove Capital - 10 Mins*
 - *STL Resources - 10 Mins*

12:00 - 1:00P

Lunch with Sponsors

- *The Exhibit Hall*

1:00 - 1:45P

Technology Platform Update

- *Val Peters, Chief Operating Officer*
- *SS&C Black Diamond Wealth Platform*
- *Scott Poore, Chief Investment Officer, Eudamonia Group*

Monday, November 11th

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1:45 - 2:00P

Turnkey Asset Management Platforms

- *Amplify - 15 Mins*

2:00 - 3:00P

Alternative Investments for Income

- *Eagle Point Credit - 20 Mins*
 - *Red Oak Capital Holdings - 10 Mins*
 - *Walton Global - 10 Mins*
 - *Triton Pacific Securities - 10 Mins*
 - *CIM Group - 10 Mins*

3:00 - 3:15P

Cookies for a Cause Snack Break

- *Exhibit Hall*

3:00 - 4:00P

One on One Meetings with Sponsors

- *Sponsor Booths Open*
- *See Registration Package for One on One Schedule*

6:00 - 7:00P

Conference Cocktail Hour

- *Stompin' Grounds*

7:00 - 9:00P

Kingswood Restaurant Takeover

- *Stompin' Grounds*

Tuesday, November 12th

All events take place at the Symphony Ballroom. Breakfast will be served at Bourbon Steak on the 34th Floor. Lunch will be served in the Exhibit Hall

8:00 - 9:00A

Breakfast with Sponsors

- *Bourbon Steak*

9:00 - 9:30A

Mandatory Compliance Presentation

- *Mike Alsoraimi, Chief Compliance Officer*
- *Alan M. Wolper, Partner, UB Greensfelder LLP*

9:30 - 10:30A

Alternative Investment Showcase

- *Inspired Healthcare - 20 Mins*
 - *Forum Partners - 10 Mins*
 - *StratCap Securities - 10 Mins*
 - *Waveland Energy - 10 Mins*

10:30 - 11:00A

Coffee Break with Sponsors

- *Sponsor Booths Open*

11:00 - 12:00A

King's Court

- *MDS Energy Development - 10 Mins*
- *Hamilton Point - 10 Mins*
- *Gladstone Securities - 10 Mins*
- *Cedar St - 10 Mins*

12:00 - 1:00P

Lunch with Sponsors

- *Exhibit Hall*

Tuesday, November 12th

All events take place at the Symphony Ballroom. Breakfast will be served at Bourbon Steak on the 34th Floor. Lunch will be served in the Exhibit Hall

1:00 - 4:00P

Find Your Advisor Headshots

- *Exhibit Hall*
 - *Signup Sheet at Registration Desk*

1:00 - 2:15P

Advisor Symposium

- *FMG Suite - 15 Mins*
- *Raymond James RIA and Custody Services - 15 Mins*
- *RBC - 15 Mins*
 - *CNB Custody*
 - *SEI Altigo*
 - *Inspira Financial*
 - *SS&C Black Diamond Wealth Platform*
 - *Amplify*

2:15 - 2:45P

Snack Time with Sponsors

- *Exhibit Hall*
- *Sponsor Booths Open*

2:45 - 4:00P

Insurance Symposium

- *One Insurance Solution - 10 Mins*
- *National Brokerage Atlantic - 10 Mins*
- *Financial Independence Group - 10 Mins*
- *Tarkenton Financial- 10 Mins*
 - *Eagle Life Insurance Company*

4:00 - 5:00P

One on One Meetings with Sponsors

- *Sponsor Booths Open*
- *See Registration Package for Details*

7:00 - 9:00P

Dine Arouds with Sponsors

- *See Registration Package for Details*

Wednesday, November 13th

All Day

Travel Day

- *Conference ends. Thank you for joining us!*

Kingswood would like to thank our **Gold** Sponsors



Kingswood would like to thank our Silver Sponsors



Kingswood would like to thank our Advisor Symposium Participants



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And finally, our **King's Court** participants

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SECURITIES**

HAMILTON POINT
INVESTMENTS

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Presents

BRITTANY BISHOP



Live at the JW Marriott, Nashville

SUNDAY, NOVEMBER 10TH AT 6:00PM

SPONSORED BY



We would like to thank the stunning **JW Marriott Nashville**
for hosting the **Kingswood Conference Series**

