



THE KINGSWOOD CONFERENCE SERIES

Nashville

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

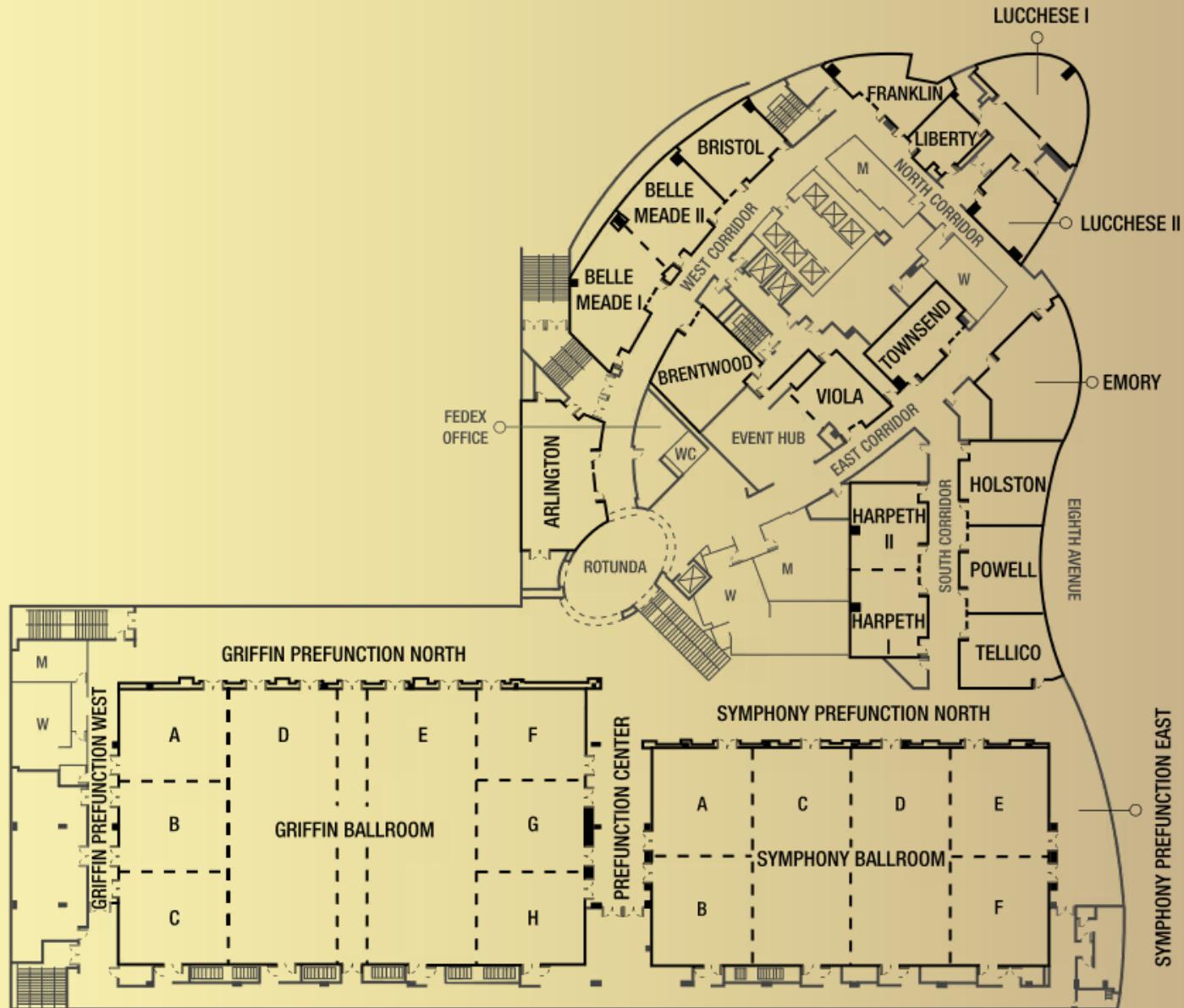
CONFERENCE AGENDA





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 <ul style="list-style-type: none"><i>The Registration Desk will be open in the Symphony Ballroom Foyer. Please pick up your Name Badge and Welcome Package.</i>
6:00 - 7:00P	The Kingswood Concert Series, Nashville <ul style="list-style-type: none"><i>The Symphony Ballroom</i>
7:00 - 9:00P	Welcome Dinner <ul style="list-style-type: none"><i>The Symphony Ballroom</i>

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 <ul style="list-style-type: none"><i>Bourbon Steak</i>
9:00 - 9:10A	Opening Remarks <ul style="list-style-type: none"><i>Douglas Blake, Managing Director of Investment Solutions</i>
9:10 - 9:30A	Kingswood Town Hall <ul style="list-style-type: none"><i>Mike Nessim, President and CEO</i><i>Val Peters, Chief Operating Officer</i>

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9:30 - 9:45A	Investment Banking <ul style="list-style-type: none">• <i>John Reed, Head of Capital Markets</i>
9:45 - 10:30A	Alternative Investment Showcase <ul style="list-style-type: none">• <i>Megatel Capital Investment</i> - 20 Minutes<ul style="list-style-type: none">◦ <i>Sovereign Partners</i> - 10 Mins◦ <i>Oxford Funds</i> - 10 Mins
10:30 - 11:00A	Coffee Break with Sponsors <ul style="list-style-type: none">• <i>Sponsor Booths Open</i>
11:00 - 11:15A	Overview of the Alternative Investment Platform <ul style="list-style-type: none">• <i>Douglas Blake, Managing Director of Investment Solutions</i>
11:15A - 12:00P	Tax Advantaged Alternatives <ul style="list-style-type: none">• <i>US Energy</i> - 20 Mins<ul style="list-style-type: none">◦ <i>Cove Capital</i> - 10 Mins◦ <i>STL Resources</i> - 10 Mins
12:00 - 1:00P	Lunch with Sponsors <ul style="list-style-type: none">• <i>The Exhibit Hall</i>
1:00 - 1:45P	Technology Platform Update <ul style="list-style-type: none">• <i>Val Peters, Chief Operating Officer</i>• <i>SS&C Black Diamond Wealth Platform</i>• <i>Scott Poore, Chief Investment Officer, Eudamonia Group</i>

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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 <ul style="list-style-type: none">• Bourbon Steak
9:00 - 9:30A	Mandatory Compliance Presentation <ul style="list-style-type: none">• Mike Alsoraimi, Chief Compliance Officer• Alan M. Wolper, Partner, UB Greensfelder LLP
9:30 - 10:30A	Alternative Investment Showcase <ul style="list-style-type: none">• <i>Inspired Healthcare</i> - 20 Mins<ul style="list-style-type: none">◦ <i>Forum Partners</i> - 10 Mins◦ <i>StratCap Securities</i> - 10 Mins◦ <i>Waveland Energy</i> - 10 Mins
10:30 - 11:00A	Coffee Break with Sponsors <ul style="list-style-type: none">• Sponsor Booths Open
11:00 - 12:00A	King's Court <ul style="list-style-type: none">• <i>MDS Energy Development</i> - 10 Mins• <i>Hamilton Point</i> - 10 Mins• <i>Gladstone Securities</i> - 10 Mins• <i>Cedar St</i> - 10 Mins
12:00 - 1:00P	Lunch with Sponsors <ul style="list-style-type: none">• <i>Exhibit Hall</i>

Tuesday, November 12th

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1:00 - 4:00P	Find Your Advisor Headshots <ul style="list-style-type: none">• <i>Exhibit Hall</i><ul style="list-style-type: none">◦ <i>Signup Sheet at Registration Desk</i>
1:00 - 2:15P	Advisor Symposium <ul style="list-style-type: none">• <i>FMG Suite - 15 Mins</i>• <i>Raymond James RIA and Custody Services - 15 Mins</i>• <i>RBC - 15 Mins</i><ul style="list-style-type: none">◦ <i>CNB Custody</i>◦ <i>SEI Altigo</i>◦ <i>Inspira Financial</i>◦ <i>SS&C Black Diamond Wealth Platform</i>◦ <i>Amplify</i>
2:15 - 2:45P	Snack Time with Sponsors <ul style="list-style-type: none">• <i>Exhibit Hall</i>• <i>Sponsor Booths Open</i>
2:45 - 4:00P	Insurance Symposium <ul style="list-style-type: none">• <i>One Insurance Solution - 10 Mins</i>• <i>National Brokerage Atlantic - 10 Mins</i>• <i>Financial Independence Group - 10 Mins</i>• <i>Tarkenton Financial- 10 Mins</i><ul style="list-style-type: none">◦ <i>Eagle Life Insurance Company</i>
4:00 - 5:00P	One on One Meetings with Sponsors <ul style="list-style-type: none">• <i>Sponsor Booths Open</i>• <i>See Registration Package for Details</i>
7:00 - 9:00P	Dine Arounds with Sponsors <ul style="list-style-type: none">• <i>See Registration Package for Details</i>

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



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CIM



Kingswood would like to thank our Advisor Symposium Participants



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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*

