

## AGENDA

MONDAY, APRIL 29, 2019

- 1:30-2:25 p.m. Registration*
- 2:30-2:35 p.m. Welcome by Kathryn Morrison, SunStar Strategic CEO**
- 2:40-3:40 p.m. Beating the Big Guys - How to Attract Assets as an Active Boutique Manager**  
Warren Miller, CEO, Flowspring
- 3:45-4:30 p.m. Inside the Media with Financial Journalists**  
Jennifer Schonberger, Fox Business Network  
John Waggoner, Kiplinger's Personal Finance  
Moderator: Melissa Murphy
- 4:30-4:45 p.m. Break sponsored by Cohen & Company*
- 4:50-5:45 p.m. Success on BD Platforms**  
Ryan Tagal, Envestnet | PMC  
Moderator: Dave Carson, Ultimus Fund Solutions
- 6-8 p.m. Reception in the Glover Park Ballroom sponsored by U.S. Bank Global Fund Services*

TUESDAY, APRIL 30, 2019

- 7-7:40 a.m. *Breakfast sponsored by Ultimus Fund Solutions*
- 7:45-8 a.m. **Opening remarks by Kathryn Morrison, SunStar Strategic**
- 8-8:55 a.m. **Case Studies**  
Devon Ramirez, Akre Funds  
Jennifer Ashlock, Tortoise  
Moderator: Andrew Strnad, U.S. Bank Global Fund Services
- 9-9:55 a.m. **Proven Growth Strategies**  
Carl Hendley, Motley Fool Asset Management  
Tom Plumb, Plumb Funds  
Ben Jones, BMO Global Asset Management  
Moderator: Jillian Bosmann, Drinker Biddle & Reath LLP
- 10-10:15 a.m. *Break sponsored by Berkshire Global Advisors*
- 10:15-11:10 a.m. **Distribution Essentials for Boutique Firms**  
Christopher Davis, Strategic Insight
- 11:15-12:10 p.m. **Advisor Outreach Ecosystem**  
David Finkelstein, Vivaldi Asset Management  
Ben Jones, BMO Global Asset Management  
Moderator: Matt Franey, Celera
- 12:10-12:30 p.m. *Break on your own*
- 12:30-1:25 p.m. *Lunch sponsored by Hennessy Funds*
- 1:30-2:25 p.m. **Digital Marketing Strategies**  
Shane Ryan, Hubspot  
Brian Tietje, LinkedIn  
Moderator: Marilyn Dale, SunStar
- 2:30-2:45 p.m. *Break sponsored by SalesStation (Celera Systems)*
- 2:45-3:45 p.m. **Trends in M&A for Funds**  
Bruce Cameron, Berkshire Global Advisors  
Neil Hennessy, Hennessy Funds  
Brad Hearsh, UBS Investment Bank  
Moderator: Chris Bellamy, Cohen & Company
- 3:50-4 p.m. **Closing remarks by Kathryn Morrison, SunStar Strategic**