

Practice Innovation Index



Cerulli Practice Innovation Summit

December 9, 2021 | Paséa Hotel & Spa | Huntington Beach, CA

Time	Agenda
12:00 PM - 1:00 PM	Registration & Lunch
1:00 PM - 1:15 PM	The Practice Innovation Index; “Partnering for Success” <i>Jared Baucom, Managing Director, Cerulli Associates</i>
1:15 PM – 1:25 PM	Introduction to PII: “Greater Success in Four Tenths of a Second” <i>Paul Brunswick, Head of Invesco Global Consulting</i>
1:25 PM – 2:05 PM	The Market Strategist Playbook <i>Brian Levitt, Global Market Strategist, Invesco</i> The Market Strategist Playbook raises the five questions that investment professionals need to answer in setting the long-term risk profiles of portfolios and to identify opportunities in markets. 1) Is this a secular bull market? 2) Where are we in the business cycle? 3) In which direction is the economy trending? 4) What will be the policy response? 5) What will be the impact on financial markets? The presentation provides the indicators and dashboards required to answer these questions.
2:05 PM – 2:50 PM	Fi-Natical Curiosity – Questions Create Answers. Curiosity Creates Connections. <i>Lisa Kueng, Managing Director, Invesco Global Consulting</i> How can financial professionals earn more business from their clients? Curiosity. “Fi-Natical Curiosity,” the sequel to our “StorySelling” program, focuses on embracing the power of curiosity with the goal of capturing up to 70% more of client assets. Believing that it’s “who they are, not just what they have,” this program seeks to teach attendees how to learn as much about their clients as possible in the shortest period by using the natural order of curiosity and the Q-cards for financial professionals.
2:50 PM – 3:00 PM	Break
3:00 PM – 3:30 PM	Accessing Innovation with Invesco <i>Ryan McCormack, Factor & Core Equity Strategist, Invesco</i> Investors are looking for targeted and thoughtful ways to gain growth exposure in their portfolios. Please join Ryan McCormack, Factor & Core Equity Strategist as he discusses Invesco’s Innovation Suite, and the newest enhancements to Invesco’s offerings. In this session, he will walk through methodology, rationale, and positioning of the strategies, specifically discussing how investors can utilize the funds to access innovation.
3:30 PM – 4:15 PM	Advisor Panel: Crafting a High-Performance Practice <i>Tim Wilkinson, Executive Consultant, Invesco Global Consulting</i> Every business, regardless of industry, is composed of two components: structure and people. If the business lacks a coherent structure and repeatable systems, that deficiency can stifle the productivity of even the most talented and engaged personnel. If, on the other hand, the business is well-structured, but the people are misaligned and/or poorly trained, results could also suffer. This panel will take you through a four-step process designed to enhance your business structure, systems, and processes to deliver a differentiated and sophisticated client engagement experience, while taking your business and team to the next level.
4:15 PM – 4:55 PM	Municipals – Credit Market with a Rate Problem – A Conversation with Scott Cottier <i>Moderator: Jared Baucom, Managing Director, Cerulli with Scott Cottier, Senior Portfolio Manager, Invesco</i> <i>Panel Participants: John Shadden, Managing Director, The Shadden Group, Morgan Stanley PWM and Graystone, Allen Schreiber, Partner – TSG Wealth and Kelly Dougherty, Family Wealth Director of 111 Wealth Management Group at Morgan Stanley</i> In today’s challenging yield environment, investors are seeking municipal bond strategies that are optimized for their income needs and risk appetite. With billions of dollars in Federal aid being sent to municipalities and municipal issuers, is this the beginning of a golden decade for municipal credit? We will discuss the underlying fundamentals driving the credit strengths of issuers in the municipal market while examining the relationship that yields in the municipal market have to other fixed income markets.
4:55 PM – 5:00 PM	The Power of Story <i>Christopher Collie, Senior Advisor Consultant</i> Stories are one of the most powerful tools we can use to engage and connect with current and future clients. The power of a story goes far beyond simply relaying facts and data and can be a highly effective way to create and build client loyalty. Christopher Collie will share his thoughts on the Power of Story and will introduce our special guest speaker, Jake Olson.
5:00 PM – 5:55 PM	Finding the Setup in the Setback <i>Jake Olson, Former USC Football Long Snapper</i> After being accepted to USC, Jake was offered a walk on spot with the USC football team, making him the first completely blind Division I college football player in history. He saw his first live action when he snapped in USC’s home opener on September 2, 2017 and graduated with a degree in business in May of 2019. During this keynote speech, Jake will cover his life story and lessons from overcoming cancer and blindness while mixing in some humorous commentary.
5:55 PM - 6:00 PM	Program Close <i>Paul Brunswick, Head of Invesco Global Consulting</i>
6:00 PM - 7:00 PM	Cocktail Reception