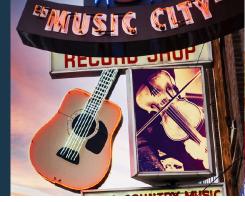


ACE ACADEMY 2022 NASHVILLE

On-Demand



General Session	Team of Teams: New Rules of Engagement for a Complex World Stanley McChrystal, Co-Founder of the McChrystal Group, Former Commander of U.S. and International Forces in Afghanistan
General Session	Geopolitics for Investors: Coping with Technology and Politics Pippa Malmgren, PhD, Former Presidential Advisor, Best-selling, Award-winning Author
General Session	The Popularity Premium: A Bridge between Classical and Behavioral Finance Roger Ibbotson, PhD, Professor in the Practice Emeritus of Finance, Yale School of Management
General Session	Navigating Choppier Markets Liz Ann Sonders, Managing Director and Chief Investment Strategist, Charles Schwab & Co., Inc.
General Session	Seeking Virtue in Finance: Learning from Role Models to Lead a Virtuous Life in Finance JC, de Swann, Lecturer in Economics, Princeton University
General Session	Winning on Value Not Price Peter Sheahan, Founder and CEO, Karrikins Group
Investment Management	Behavioral Finance Topic Chris Geczy, Associate Professor, Wharton
Investment Management	Moving Beyond the 60/40 Portfolio Tony Davidow, CIMA®, President & Founder, T. Davidow Consulting, LLC
Practice & Client Management	Positive & Productive Client Communication - Behavioral Finance Principles in Action Barbara Kay, President, MA, LPC, RCC, Barbara Kay Coaching
Practice & Client Management	The Winning Prospects of Prospect Theory Herman Brodie, Founding Director, Prospecta Limited
Practice & Client Management	What High-Net-Worth Clients Can Teach You About Growth Julie Littlechild, Founder, AbsoluteEngagement.com
Retirement Management	Putting Retirement Research into Perspective and Practice Avi Sharon, Executive Vice President and Product Strategist, PIMCO, Bob Powell, CFP® (moderator), Retirement Management Journal, Katherine Roy, CFP®, Chief Retirement Strategist, JP Morgan Asset Management, Managing Director, Mathieu Pellerin, PhD, Senior Researcher, Dimensional Fund Advisors
Retirement Management	Social Security: Your (Clients') Questions Answered Elaine Floyd, CFP®, Director, Retirement and Life Planning, Horsesmouth LLC
Wealth Management	Critical Estate Tax Law Planning Conversations for Your Most Important Clients Steve Siegel, JD, LLM, President, The Siegel Group
Wealth Management	Using Trusts as IRA Beneficiaries Jeffrey Levine, CPA/PFS, CFP® , AIF, CWS, MSA, Lead Financial Planning Nerd, Kitces.com
Wealth Management	ESG ETFs and Indices Kiley Miller, Director, ESG Investment Solutions, Envestnet, Margaret Dorn, Head of ESG Indices, North America S&P Dow, Noel Pacarro Brown, CIMA®, CPWA®, Lead of the Conscious Wealth Management Group, Morgan Stanley
Wealth Management	DAFs vs. Private Foundations Alex Neckles, Regional Director, Distribution, ImpactAssets, Josh Stamer, Philanthropy Strategist & Senior Managing Director, Foundation Source, Noel Pacarro Brown, CIMA®, CPWA®, Lead of the Conscious Wealth Management Group, Morgan Stanley