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*