

# CLS ADVISOR INSIGHT™ CONFERENCE

OCTOBER 10-12 | OMAHA, NE

*Hear from industry leaders,  
uncover tips to grow your  
practice & learn how to  
better serve your clients*

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## FEATURED SPEAKERS



**NEEL BHATIA**  
Scala Talent  
**Secrets to Hiring Star  
Performers**



**JOHN DIEHL**  
Hartford Funds  
**8,000 Days of  
Retirement**



**JOHN HYLAND**  
BlackRock  
**ETFs: Fundamentals,  
Trends & Myths**



**GARY ROSSI**  
Fidelity Investments  
**Personal Security from  
All Angles**

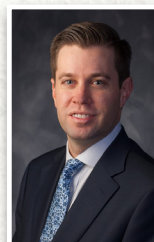


**SCOTT WEST**  
Invesco Consulting  
**Priceless: The  
Language of Value**

## BREAKOUT SESSION SPEAKERS



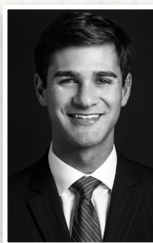
**JOHN CIANCIULLI**  
Team Edge Consulting  
**Strategies to Drive  
Advocacy & Growth**



**BRAD FEELEY**  
John Hancock  
**Discussing Fees  
with Clients**



**VICTORIA FERNANDEZ**  
CrossMark  
**To Bond or  
Not To Bond**



**JAY JACOBS**  
Global X  
**NextGen Wealth:  
Beyond the Boomers**



**ANNA MADAMBA**  
Vanguard  
**Insights on Advisor  
Selection & Trust**



**BRAD SHEPARD**  
WisdomTree  
**Why & How Prospects  
Choose Advisors**



**BRI WILLIAMS**  
SSGA  
**The True Power of  
Financial Advice**

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## PANEL PARTICIPANTS & MODERATORS

### VALUE OF ACTIVE MANAGEMENT PANEL



**GRANT ENGELBART**  
CLS Investments  
Moderator



**RICH LANG**  
American Funds  
Panelist



**PETER SACKMAN**  
Davis Advisors  
Panelist

### SMART BETA PANEL



**JOE SMITH**  
CLS Investments  
Moderator



**TODD MATHIAS**  
Franklin Templeton  
Panelist



**RICK GENONI**  
LeggMason  
Panelist



**CHRISTOPHER HUEMMER**  
Northern Trust  
Panelist



**NED DANE**  
OppenheimerFunds  
Panelist



**BRANDON RAKSZAWSKI**  
VanEck ETFs  
Panelist

## PLUS: AN INSIDE LOOK AT CLS



**RYAN BEACH, CEO**  
CLS Investments  
State of the Company  
& Strategic Initiatives



**RUSTY VANNEMAN, CIO**  
CLS Investments  
Meet the CLS Portfolio  
Management Team



**CHAD BOYER, CTO**  
CLS Investments  
CLS Technology  
Initiatives



**NICK ARREOLA, PhD**  
CLS Investments  
CLS Behavioral  
Finance Initiative

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