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The Umstead Hotel & Spa, Raleigh



Tuesday,
August 29, 2023

TIME

SESSION & SPEAKER

4:00-4:05pm

Welcome

- **Wesley Vance**, Senior Advisor Consultant, Invesco

4:05-4:50pm

The Science Behind Success: How Every Advisor Should Plan for the Future

- **R.J. Shook**, Co-Founder & President, SHOOK Research, Senior Forbes Contributor

4:50-5:10pm

Evolving Your Business for Success

- **Dave Thomas**, Executive Consultant, Invesco Global Consulting

5:10-5:15pm

Invesco QQQ: Help Power Your Portfolio with Innovation

- **Wesley Vance**, Senior Advisor Consultant, Invesco

5:15-5:50pm

Liquidity Event Planning for HNW Clients

- **Stan Domanski**, SMA Specialist, Invesco Managed Accounts

5:50-6:00pm

Closing Comments

- **Wesley Vance**, Senior Advisor Consultant, Invesco

6:00-8:00pm

Networking Dinner