



*Share best practices among outstanding advisors in the industry
and thereby help deliver better service to your clients.*

Thursday, June 4, 2009

11:50-12:30 pm Luncheon *Ritz-Carlton Ballroom Salon I*

12:30-1:20 pm General Session *Ritz-Carlton Ballroom Salon II*

Comments from Ed Finn, Barron's

*From Surviving to Thriving:
Lessons Learned From The Current Market.*

Mark Curtis, Smith Barney

1:20-1:30 pm Break *Ritz-Carlton Foyer*

1:30-2:20 pm *Ritz-Carlton Ballroom Salon II*

*Managing Practices, Investments and
Client Relationships During Challenging Times.
A Discussion with Three Top Advisors*

Brian Pfeifler, Morgan Stanley

Gregory Vaughan, Morgan Stanley

Nadine Wong, Morgan Stanley

2:20-2:30 pm Break *Ritz-Carlton Foyer*

2:30-3:20 pm Workshop 1 *Ritz-Carlton Ballroom Salon II*

*The New Face of Finance:
A Discussion by Three Top Barron's Editors*

Erin Arvedlund, Former Editor, Barron's

Jim McTague, Washington Editor, Barron's

Michael Santoli, Associate Editor, Barron's

Workshop 2 *Ritz-Carlton Ballroom Salon III*

*Your Money and Your Brain:
The Neuroscience of Fear and Greed.*

Jason Zweig, Investing & Personal Finance Columnist,
The Wall Street Journal

3:20-3:30 pm Break *Ritz-Carlton Foyer*

3:30-4:10 pm *Ritz-Carlton Ballroom Salon II*

*The State of the Financial Services Industry
and the Future of Advice.*

Chip Roame, Managing Principal,
Tiburon Strategic Advisors

4:10-4:50 pm *Ritz-Carlton Ballroom Salon II*

Brave New World—Leadership in a Time of Trauma

Mary Deatherage, Smith Barney

4:50-5:00 pm *Ritz-Carlton Ballroom Salon II*

Closing remarks from Ed Finn, Barron's

5:00-8:00 pm *Ritz-Carlton Foyer*

Investment Managers Reception

*Mix and mingle with your peers and enjoy food,
fine wine and music.*

*Attendees of the Barron's/Winner's Circle conference can apply for
5 hours non-IMCA credits. Please see registration desk for details.*