

Agenda

Thursday, June 12, 2008

8:15 – 8:30 am

Breakfast:

Sponsored by Fidelity Institutional Wealth Services

8:30 – 9:00 am

Welcome & Opening Comments: *Phillip Fournier & Larry Gaffey*

Larry Gaffey will update you on the State of the Firm and will answer questions concerning Spire and our vision.

9:00 – 10:30 am

Fidelity Products and Services : *Tino Delollis*

Fidelity will address their technology improvements as well as their product and service selections. This is a great practice management session which will help you to better understand Fidelity's full product and service offering and the positive impact they can have on your business.

10:30 – 10:45 am

Break/Office Calls:

Sponsored by Open Finance Network

10:45 – 11:15 am

Fidelity Charitable Trust Fund: *James Brunger*

Many clients are interested in philanthropy. Fidelity Charitable Trust Fund offers clients an efficient and cost effective means to achieve certain philanthropic goals..

11:15 – 12:00 pm

The Performance Workstation of the Future: *Sean Smith, Open Finance Network*

Sean Smith will demonstrate the OFN Workstation. This workstation is the culmination of 3 years of engineering and programming and is designed to provide consultants with the most versatile view of their clients data possible today.

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12:00 – 2:00 pm

Working Lunch, Gain the Competitive Advantage Through Business Etiquette: *Anna Post*

Social skills and grace are often the difference between success and failure in today's competitive marketplace. Building trust, earning respect, and mastering a professional image are some of the topics Anna Post will cover. Bring your questions for an interactive discussion on etiquette or handling business situations.

Sponsored by Ivy Funds

2:00 – 3:00 pm

Schwab Institutional Technology Offerings: *Jerry Kelly*

Jerry Kelly will take us through the Schwab technology offering. He will highlight enhancements and ways to maximize the value of the many resources available through our friends at Schwab.

Sponsored by Schwab Institutional

3:00 – 3:15 pm

Break/Office Calls: *Sponsored by JP Morgan Asset Management*

3:15 – 4:15 pm

Structured Notes: *Steve Czick, JP Morgan Asset Management*

Structured Notes are an ever-growing segment of the financial markets. JP Morgan was named as the top seller of Structured Notes last year; and Steve will provide insight into alternative types of structured notes, providing examples, and offering ways to integrate them as solutions in client portfolios.

4:15 – 5:00 pm

Roundtable: Consultants' Best Ideas

Phill Fournier will moderate this highly interactive discussion. Consultants are asked to bring their best ideas to share with everyone. These ideas may include but should not be limited to practice management techniques, investment vehicles, financial/estate planning strategies, marketing ideas, or unique uses of technology.

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5:30 – 6:00 pm

Social Hour: *Chima's Brazilian Steakhouse*

Enjoy a time with all of the Symposium Sponsors as well as mingling with the other consultants. This is a great place to discuss different aspects of your practice and continue the best ideas discussion.

6:00 – 8:00 pm

Dinner: *Chima's Brazilian Steakhouse*

Enjoy an evening of food, drink, and socializing with the Symposium Sponsors and your fellow consultants. You will enjoy an amazing meal!

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Friday, June 13, 2008

8:15 – 8:30 am

Breakfast: Sponsored by Brandes Investment Partners

8:30 – 8:45 am

Spire and Industry Growth: David Blisk, Spire Investment Partners

David will provide an update on our marketing and recruiting efforts. He will answer any questions you might have pertaining to these topics or the Firm in general.

8:45 – 9:45 am

Fixed Income: Understanding Credit Ratings and Their Impact on the Bond Market. Cliff Reirson, Brandes Investment Partners

Cliff will discuss Brandes' perspective on the recent problems with the fixed income markets, what they believe the future holds, what credit ratings have done and will do to impact the markets, and where Brandes believes opportunities exist.

9:45 – 10:00 am

Break/Office Calls: Sponsored by Open Finance Network (OFN)

10:00 – 11:00 am

Schwab Products and Services: Gabe Garcia, Schwab Institutional

Gabe Garcia will review the different products and services available to our consultants. This is a great practice management opportunity to better understand their full product and service offering and the positive impact it can make on your business.

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11:00 – 12:00 pm

Michael Weisskopf, Senior Correspondent for Time Magazine

Michael Weisskopf was wounded in Iraq as he threw a grenade out of the humvee in which he and others were riding. As he lay in the amputee room at Walter Reed, he realized that he was very close to losing all that he had—friends, two wonderful children, a beautiful girlfriend, and future memories. As he puts it, “He lost his hand but found himself.”

A senior correspondent for Time magazine, Michael Weisskopf is a Pulitzer Prize finalist and winner of the George Polk Award, the Goldsmith Award for Investigative Reporting, the National Headliners Award, and the Daniel Pearl Award for Courage and Integrity in Journalism. As an investigative reporter for the nation section, Weisskopf has scored many scoops, including the smoking-gun letter of FBI whistle-blower Coleen Rowley and broke stories on Arthur Andersen’s shredding of Enron documents, President Bill Clinton’s deal with prosecutors and several Monica Lewinsky stories.

12:00 – 12:15 pm

Closing Remarks *Phillip Fournier*