

**Arrival Day - Registration Opens - Welcome Dinner Reception**

**Day 1**

Breakfast

**Welcome and ESI Remarks**

**Advisor as the Chief Executive Officer**

**10 Practice Management Ideas to Build Your Business**

**Sales/Marketing/Branding Track**

**Practice Management**

**Operations/Technology**

Creating Your Marketing Plan: Increasing Sales and Engaging Clients

Building an Advice-Based Practice

Doing Business with ESI – Powered by Docupace

One Size Does Not Fit All: Generating Retirement Income for Every Client

ESI Advisory Solutions

How a CRM can Fuel your Growth

Annuities as an Asset Class

What In A Fee Justifies The Value of Services

The Power of Data and Performance

Lunch with

Activating the 3 Pillars of Growth: Sales, Referrals, and COIs

**Rep Roundtable Session** - a fast-paced session is non-stop sales, practice management, and marketing ideas!

**Elevating Your Client Experience**

**Day 2**

Breakfast

Welcome

Building a Photographer's Your Clients

**Value of Retirement Income Planning**

**Sales/Marketing/Branding Track**

**Practice Management**

**Operations/Technology**

Fee-based 401k Business

Practice Building Formula E=MC2

Illuminations 101

Social Media: Build Your Brand

How to Avoid NIGO

Technology Horizons: What's New

Bonds 101

ESI Portal & Compensation Training

Wealthscape Support – Save yourself a call

Lunch with Partners

**When Your Clients' Health and Wealth Collide**

**Close and Next Steps**

**SAMPLE AGENDA**