2016 OBSU Conference Agenda

Fort Lauderdale, Florida

Wednesday, May 4th

6:00-8:00pm	**Welcome Reception**

Thursday, May 5th

8:00-8:30am	**Breakfast**
8:30-9:30am	**Building your Business with OBS Financial** - *John Henry, CEO, OBS Financial* The OBS Team, led by John Henry, will share with you the many enhancements OBS has made and continues to make to its product and service offering. Learn how to use these tools to distinguish yourself in an ever-increasingly competitive marketplace.
9:30-10:30am	**Cyber Fraud** - *Bill French, VP Risk Management, Fidelity Investments* Cyber threats continue to grow more sophisticated. Just as technology advances, so do the tools cyber criminals use to steal from clients. Wire fraud, identity theft, and email scams – especially "phishing" – currently threaten data security for broker-dealers and financial advisors – and are growing in number and sophistication. Bill will explore ways to help protect your firm and clients from cyber fraud.
10:30-10:45am	**Networking Break**
10:45-11:45am	**Successful Strategies to Grow your 401(k) Practice** - *Lisa Lacayo, VP Sales, The Newport Group* By focusing on best practices of successful retirement plan advisors, Lisa will help you understand what advisors do, and more importantly don't do, to allow them to increase their presence, become more profitable, and increase client satisfaction/retention.
11:45-12:30pm	**Break for Lunch**
12:30-1:45pm	**The Advisor's Purpose** - *Gene Fama, Jr.* Innovation in financial science has brought a new and deeper understanding of the relation between risk and return. This has transformed the planner's task. Rather than hunting for performance, the effective advisor now focuses on total plan structure. The advisor is free to elevate his function to one that depends less on the whims of randomness and more on creating better investors, sounder strategies, and a stronger practice.
1:45-2:45pm	**The New Fiduciary Standard** - *Jim Febeo, Senior VP Government Relations, Fidelity Investments* The Department of Labor's proposed new fiduciary rule will expand the types of retirement investment advice covered by fiduciary protection. Under DOL's proposed definition, any individual seeking compensation for providing advice that is individualized will now be a fiduciary – the suitability standard is out. Jim will discuss the impact these changes will have on the industry.
2:45-3:00pm	**Networking Break**
3:00-4:30pm	**Getting to the Why** - *Carl Richards, Certified Financial Planner and Author/Columnist* A dynamic international speaker well-known for his back-of-the-napkin drawings, Carl has been explaining the basics of money through simple graphs and diagrams for many years. Creator of the weekly "Sketch Guy" column in The New York Times and author of *The Behavior Gap* and *The One-Page Financial Plan*, Carl will share his straightforward and no nonsense approach to our business and how he perceives our rapidly changing industry.
4:30-5:00pm	**Book Signing and Meet & Greet with Carl Richards**
5:00-9:45pm	**Dinner Cruise on Intracoastal Waterways**

Friday, May 6th

8:00-8:30am	**Breakfast**
8:30-9:30am	**Communicating the Story** – *Paul Lehman, Vice President, Dimensional Fund Advisors* Most of us know the DFA Investment Story, but are we communicating it effectively to clients and prospective clients? Are we sharing the aspects of the story that are most important to clients? Paul will explore this and share his insights for incorporating storytelling into your selling approach.
9:30-11:30am	**Client Panel Discussion** – *Best Practices* A highlight of OBSU 2015, we will once again feature a panel of OBS clients who will share ideas and best practices for leveraging the resources of OBS to grow your businesses.
11:30-12:00pm	**Conference Closing Remarks** - *John Henry, CEO, OBS Financial*

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REGISTERED INVESTMENT ADVISOR