

FIS Connect – Wealth and Retirement 2018 Agenda

Monday, April 9							
6:30am-6:00pm	Registration – Convention Foyer						
5:00-6:00pm	Wealth and Retirement Welcome Reception						
6:00-8:00pm	Solutions Expo Welcome Reception – Atlantic Hall						
Tuesday, April 10							
7:00am-6:00pm	Registration – Convention Foyer						
7:00-8:15am	Breakfast – Northern Hall						
8:30-10:30am	FIS Opening General Session – Pacific Hall						
10:30-11:00am	Break – Atlantic Hall, Northern Foyer						
10:30am-12:00pm	Solutions Expo Open – Atlantic Hall						
11:00am-11:45am	Banking & Payments General Session – Pacific Hall						
TRACKS	Charlotte	Omni	Relius	Retirement	TrustDesk	WealthStation	Wealth
12:00-12:45pm	Lunch – Northern Hall			Working Lunch – Legislative and Regulatory Update #424 – Robert Richter and Larry Goldbrum	Lunch – Northern Hall	Lunch – Northern Hall	Lunch – Northern Hall
1:30-4:30pm	Solutions Expo Open – Atlantic Hall						
TRACKS	Charlotte	Omni	Relius	Retirement	TrustDesk	WealthStation	Wealth
1:00-2:00pm		Omni General Session #400 – Bill Byerly	FIS Retirement Solutions Welcome and Opening Remarks #415 – Scott Parry				FIS Wealth Solutions – Seizing the Wealth Management Market #517 – Luke McCabe
2:15-3:15pm		Session 1 Get an In-depth Look at the Omni Roadmap #401 – Tom Heberlein, Cathy Boone, Brahim Chouch, Peter Michalik, Paula Lakeman and Karen Wells Session 2 Managed Services for Growth #402 – Tina Aderhold	Get an In-Depth Look at the Relius Roadmap #416 – Warren Jennings			Modeling Trusts with Advanced Financial Planning Tools #518 – Aaron Reynolds	The New Digital Wealth Office #515 – Cameron Taylor
3:15-3:30pm	Break – Atlantic Hall, Northern Foyer						
3:30-4:30pm	Charlotte Roadmap Overview and Product Offering #506 – Sara Ware and Sharon Vaughn	Session 1 Operational Upgrade Assessments: Getting the Most Out of Your Existing Omni Investment #403 – Sherry Baker Session 2 Omni’s Commitment to Keeping You and Your Clients Secure #404 – Brahim Choucha, Tom Herberlein, Cathy Boone and Karen Wells	Session 1 A Comprehensive Communications Suite for Both Participants and Plan Sponsors #420– David Schultz Session 2 Eliminate Redundancy by Automating Daily Operations with FIS’ STP Solution #421 – Colleen Williams	Portfolio Model Technology: Accommodating the Needs of Advisor-Driven Models in 401k Plans #425 – Jim Foster and Trish Carabello	Improving Productivity Through Front-Office Automation #508 – Anne Marie Kastenholz	Achieving Higher Client Satisfaction with Goal-based Investing and Best Interest Check #519 – Aaron Reynolds and Troy Hirschi	Future Enhancements: Portfolio Management, Regulatory Compliance and Performance Reporting #513 – Steve Schneider
4:30-4:45pm	Break – Atlantic Hall, Northern Foyer, Swan Foyer						
4:45-5:45pm	Wealth and Retirement General Session #507 – Southern I-II						
6:00-8:00pm	Solutions Expo Reception – Atlantic Hall						

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Wednesday, April 11							
7:00am-6:00pm	Registration – Convention Foyer						
7:00-8:15am	Breakfast – Northern Hall						
8:30-9:30am	Keynote Speaker – Cal Ripken, Jr. Pacific Hall						
10:00-10:15am	Break – Atlantic Hall, Northern Foyer, Swan Foyer						
10:00am-12:30pm	Solutions Expo Open – Atlantic Hall						
TRACKS	Charlotte	Omni	Relius	Retirement	TrustDesk	WealthStation	Wealth
10:15-11:15am	Streamlining Workflow with Charlotte's Process Management #504 - Joanie Hunt and Sharon Vaughn			The Retirement Challenge #430 – Barbara March (100+clients)	TrustDesk 2018 Roadmap #511 – Karl Reinders	Providing Enhanced Analytics to Today's Financial-savvy Clients #520 – Troy Hirschi and David Benskin	
11:15-11:30am	Break – Atlantic Hall, Northern Foyer, Swan Foyer						
11:30am-12:30pm	Month-End Processing for Charlotte Users #505 - Joanie Hunt and Sharon Vaughn	Intelligent Automation in Omni #405 – Susheel Nesargi and Sonny Williams	Session 1 How Efficient are Your Relius Practices? #419 – Colleen Williams Session 2 Learn How Relius Can Help with Year-End Data Collection #417 – Warren Jennings	Participating in the 403(b) Revolution #427 – David Schultz	Key Features to Drive Operational Efficiencies #509 – Barry Wintringer		
12:30-1:45pm	Lunch – Northern Hall						
1:45-3:30pm	Solutions Expo Open						
2:00-3:00pm	Charlotte New Release Training #500 – Joanie Hunt and Sharon Vaughn	Omni User Group General Session #407 – Wanda Mies and Susheel Nesargi	Session 1 Relius' Commitment to Keeping You and Your Clients Secure #418 – Bhanu Kotagiri	How to Better Engage Advisors #429 – Warren Jennings and David Schultz	Servicing Your Clients through e-Commerce #510 – Anne Marie Kastenholz		Implementing an Outsourced CIO Solution #516 – Jim Foster
3:00-3:30pm	Break – Atlantic Hall, Northern Foyer, Swan Foyer						
3:30-4:30pm	Client Portal Reporting in Charlotte #502 – Joanie Hunt and Sharon Vaughn	Session 1 Omni Trade User Group #408– Peter Michalik and Paula Lakeman Session 2 Omni Payments User Group Session #409 – Cathy Boone Session 3 Omni DC User Group Session #410 – Tom Heberlein and Karen Wells (Other BAs TBD)	Session 1 Improving How Your Participants Plan for Their Retirement Future #423 – Warren Jennings and Troy Hirschi Session 2 The Power of Reporting at Your Fingertips #422 – Millie Ferrare	Managed Services for Growth #428 – Tina Aderhold	TrustDesk Roundtable #512 - Jeff Hilger		
5:00-6:30pm	Solutions Expo Grand Finale – Atlantic Hall						
7:00-10:00pm	Signature Event – Food and Wine event with private concert with Darius Rucker						

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Thursday, April 12							
7:30-8:30am		Breakfast – Northern Hall					
8:00-11:00am		Registration – Convention Foyer					
TRACKS	Charlotte	Omni	Relius	Retirement	TrustDesk	WealthStation	Wealth
8:30-9:30am	Exploring Daily Charlotte Reporting – What’s Important #501 - Joanie Hunt and Sharon Vaughn	Session 1 Omni Trade User Group Session #411 – Peter Michalik and Paula Lakeman Session 2 Omni Payments User Group Session #412 – Cathy Boone Session 3 Omni Client Facing Solutions User Group Session #413 – Brahim Choucha and Karen Wells (Other BAs TBD)					
9:30-9:45am		Break – Atlantic Hall, Northern Foyer, Swan Foyer					
9:45-10:45am	Charlotte’s Idea Exchange: Strengthen Your Institution through Shared Ideas #503 – Sarah Ware and Sharon Vaughn	Session 1 Omni Trade User Group Session #411 – Peter Michalik and Paula Lakeman Session 2 Omni Payments User Group Session #412 – Cathy Boone Session 3 Omni Technology User Group Session #414 – Tom Heberlein, Cathy Boone, Brahim Choucha and Karen Wells					
11:00 a.m.		Connect Adjourns					