

# Digital Audio Archives

Investment Management Consultants Association  
 2009 Fall Professional Development Conference  
 October 1-3, 2009 – Atlanta, GA

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<b>GENERAL SESSIONS</b>			
1. GS#5 — Navigating Normalization: Priorities and Opportunities, Ronald Temple	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. GS#6 — What Do Investors Want? And How Do Our Wants Shape Our Behavior?, Meir Statman	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. GS#7 — R.E.A.C.T. – Reassure, Encourage, and Articulate Clear Tactics..., John Vautier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>SUPER SESSIONS</b>			
4. Emerging Markets: Problems and Perspectives, John-Paul Smith	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Barron's Top 100 Advisor Panel, Moderated by: Sterling Shea	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Hunting for Black Swans – Comparing Probability Outcomes of Capital Market Assumptions to Historical Observations, David B. Loeper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. The Pension Crisis, Ronald J. Ryan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Mindfulness Strategies for Wealth and Stress Management, James H. Bramson and Lauren D. Keith	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>WORKSHOPS</b>			
9. A Purposeful Legacy – Estate and Philanthropic Planning in Action, Valentina Glaviano and Douglas K. Mellinger	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Institutional Best Practices in the Current Environment – Panel Discussion, Moderator: Kevin Sanchez	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Taxes and Investment Management: Observations from the Field, Paul Bouchey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. Age Banding: A Model for Planning Retirement Needs, Somnath Basu	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. Qualified Plans, IRAs, and The Roth Revolution, David W. Polstra	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. Rainmaker: Building Strategic Partnerships with Lawyers and Accountants for a Pipeline of New Affluent Client Referrals, Maura Scherer-Merlo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15. Transitioning Into a Family Office – Panel Discussion, Moderator: Brian Ullsperger	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16. ERISA Litigation Matters and Evolving Best Practices, Marcia S. Wagner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17. Creating Efficiencies with Software, Jon Finkelstein	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18. Working with Foundations and Endowments in a Challenging Market, Alicia Philipp	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19. Growing and Maintaining a Successful High-Net-Worth Practice in Today's Environment – Panel Discussion, Moderator: Julie Baeder	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20. The Yield Disparity in 401(k) Plans: Does Higher Annual Pay Mean Higher Rates of Return on Retirement Accounts?, Matthew Morey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
21. Three Basic Hedging Strategies Every High-Net-Worth Advisor Should Understand., Robert M. Lanigan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22. Pitch the Client, Not the Book – Customize Your Standard Presentation...: John Vautier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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