

SOUTHEASTERN SOCIETIES CONFERENCE

Holiday Inn, Charlotte City Center
Charlotte, NC

April 27 & 28, 2023



Presenting Sponsor



Invesco

Great leaders have the ability to
inspire those around them

Come on down to Carolina!

Welcome to the Second Annual Southeastern Societies Leadership Conference

The **planning committee** did a remarkable job seeking input from members in order to design a program that is both educational and engaging. Programs like this, however effortless they appear to be, are the product of an incredible amount of dedication and hard work. It's the result of the collective effort of fantastic Society leaders like you, who are passionate about becoming better leaders, sharing ideas and creating member value.

A special shout out goes to the 2020 and 2023 Planning Committee Members: Steve Curley (Orlando), Christine Brown (Tampa Bay), Bobby Lamy (North Carolina), George Chen (Atlanta), Aaron Jacobson-Swanson (Atlanta), Cathy Ford (Atlanta), Jennifer Garbowicz (PCR), Sheri Gillette (North Carolina), Chris Hopkins (East Tennessee), Melissa Kellenberger (South Florida), Anne Rogers (North Carolina), Ralph Lehman (East Tennessee), Jim Murphy (South Florida), Thomas Matthews (Naples), Ryder Taff (Mississippi), and Kari Baer Anderson (Tampa Bay).

Thanks also go out to our **Conference Partners** for their continuing support. As key stakeholders of CFA Institute Societies, we value their participation in the conference as it extends our reach throughout the investment management industry. We encourage you to visit

with each of our Partners and discuss how they can bring value to your society. Throughout this conference, we encourage you to stay engaged, ask questions, and share your expertise. And again, thank you for attending the conference and bringing your expertise to our gathering.

Regards,

Bobby

Bobby Lamy, PhD, CFA
CFA Society NC

George

George Chen, CFA, CIPM
PCR Southeastern Regions

Southeast Societies

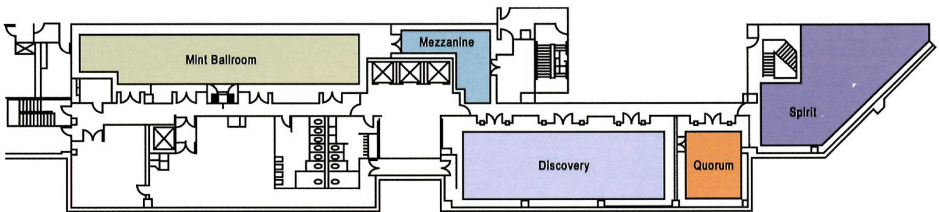
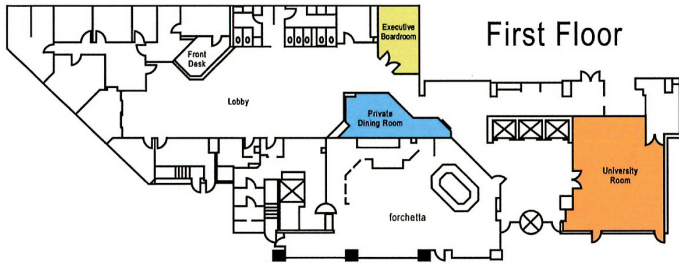
Alabama	Naples
Atlanta	Nashville
East Tennessee	North Carolina
Jacksonville	Orlando
Louisville	South Carolina
Memphis	South Florida
Miami	Tampa Bay
Mississippi	Virginia



Holiday Inn®

CHARLOTTE - CENTER CITY

For WiFi, please connect to the network **IHG Connect**. From there select to enter an access code, the access code is **CLTDT**.



First Floor

-  Executive Boardroom
-  Private Dining Room
-  University Room

Second Floor

-  Mint Ballroom
-  Mezzanine
-  Discovery Ballroom
-  Quorum Room
-  Spirit Room

Thursday, April 27, 2023

10:30 am	Registration Desk Opens		
11:15 to 11:50am	Session 1 - President's Roundtable		
12:00pm	Networking Luncheon		
12:50 to 1:00pm	Welcome <i>Carolina On My Mind</i> Bobby Lamy, PhD, CFA		
1:00 to 2:00pm	Session 2 <i>The Care and Nurturing of Candidates: Future Proof Your Society</i> Steve Curley, CFA, CFP Present and future state of mentoring programs and candidate relations		
2:00 to 2:15pm	Afternoon Networking with Colleagues & Partners		
2:15 to 3:00pm	Session 3 <i>Building Your Professional Brand Using Social Media</i> Amie Thompson, Creativeallies In this presentation you will learn to engage in the logical and emotional side of your message and customize it to your audience, learn the importance of both the content and the delivery and how to prepare for presentations and meetings (creating your own playbook).		
3:00 to 3:45pm	Session 4A: Building an Effective Board The Board of Directors serve as an ambassador for the Society's values, mission and vision of the organization. The goal of this session is to share ways to improve a Board's engagement and effectiveness.	Session 4B: Programming for Impact Event programming is the primary connection between members and Societies. We will discuss approaches to delivering relevant, fresh, and fun programming experiences.	Session 4C: Branding is More Than a Logo Raising awareness of the CFA designation remains a top priority of members. Society Leaders will share experiences on how to effectively "Market the Message".
3:45 to 4:00pm	Partner Showcase: Diamond Hill, Kaplan Schweser, Voya		
4:00 to 5:00pm	Session 5 <i>Dynamic Networking</i> Carlos Davis of Stand & Deliver, LLC Networking is less about your needs and more about the needs of the others.		
5:30 to 7:30pm	Networking event at Dimensional Fund Advisors		

Friday, April 28, 2023

7:30 to 8:30am Continental Breakfast

8:30 to 10:00am
Session 6
T.E.A.M. Dynamics: Selling and Managing with Personality DNA
George Amidon, Senior Consultant, Invesco Global Consulting
How to turn personality conflicts into personality connections. "T.E.A.M. Dynamics" is designed to help understand your own, and others, core personality types, how clients and prospects perceive them, and how to bridge the gap between their personalities and those of their clients.

10:00 to 10:15am Partner Showcase: Blackrock, Franklin Templeton, Parametric

10:15 to 10:30am Morning Networking with Colleagues & Partners

10:30 to 11:20am
Session 7
Story Telling in the Age of Data
Christian Newton, Dimensional Fund Advisors
Guidance for investment professionals on how to assess the most relevant social media platforms and tips to maximize impact and drive customer touchpoints.

11:25 to 12:15pm
Session 8
Peer to Peer Roundtables
Preparing board members for their role is a continuing struggle for societies. This session is designed for members to discuss the spectrum of functional board roles and share "hits and misses". Separate tables will be dedicated for specific roles, such as, "What the Tech?" and participants will be encouraged to rotate according to their role and preferences.

12:15 to 12:30pm
Session 9 - Closing
Shared Ideas and Wrap-up

12:30 to 1:30pm
Rounding Third and Heading for Home....
Luncheon with Colleagues & Partners or Catch Your Flight Back to Home Base

Our Speakers

George Amidon

Senior Consultant,
Invesco Global Consulting

George is currently working with Invesco Global Consulting delivering keynote presentations and workshops as well as supporting Invesco Sales Development and Education as a key partner, providing and delivering content for our "Momentum" program. George is also a Managing Partner for JAM Consulting Group, Inc., a sales and management consulting firm. He is an integral member of a team of accomplished professionals that works to accelerate the performance of sales professionals and management teams for over 30 years.

George earned a BA in Economics from Boston College in Chestnut Hill, MA. He is an avid hockey fan and outdoor enthusiast.

Steve Curley, CFP, CFA

Steve Curley is an experienced executive in the investment management/private wealth management profession. Most recently he was Chief Investment Officer and one of three principals at WaterOak Advisors, an

independent Fee-Only private wealth management firm based in Winter Park, FL with \$2+ billion in assets under management.

He holds a Master of Business Administration from UCF (2007), the CFP designation and is a CFA charter holder. Steve has been recognized by the Investment News Top 40 Under 40 award, the Orlando Business Journal Top 40 Under 40 award and National Top Advisor Rankings for Forbes & Barron's. He has been featured in the Wall Street Journal, Barron's, Kiplinger, and Florida Trend. He is co-founder/host of The Investors First Podcast, which was awarded the Impact & Innovation Award from the CFA Institute. He is a board member of CFA Society Orlando, a board member of venVelo, and a board member of the UCF College of Business Finance Advisory Board. His long-term goal is to build a globally respected investment profession in Central Florida, where he was born and raised.

Carlos Davis

At some point in your career, have you felt stuck? You feel like you can't move up in your job. You feel like no one is buying from you. You feel like

no one wants to do business with you. Everyone wants to get a lot out of their career, but not everybody knows how. This seminar will teach Carlos Davis' proven system that can take you wherever you want to go in your professional career. He will uncover the secrets of how to improve your face to face interactions to make you the magnet of opportunity and influence. He will also share the ONE WORD that can break down any barrier in starting a professional relationship. All of this along with some fun, interactive exercises will open the doors for you and your career! He is the author of *Open Says Me: THE System That Can Open Any And All Opportunities In Your Career*.

He has been awarded the Black Enterprise Modern Man Award from Black Enterprise Magazine and has been a finalist for the Charlotte Chamber of Commerce Young Professional Entrepreneur of the Year.

Christian Newton

Christian Newton helps financial advisors leverage Dimensional's capital markets research and its application to portfolio and practice management. Previously, Christian spent 10 years in Dimensional's Marketing group, serving variously as Art Director, Head of Interactive, and Vice President of Marketing, with

a focus on creating materials for financial advisors.

Christian experienced the first wave of internet growth working at consulting conglomerate SWeb/CKS. He holds a BA in history from the University of Massachusetts at Amherst. His online writing has been profiled in the New York Times and Entertainment Weekly.

Amie Thompson , SMS

Amie is a dynamic executive, sought-after speaker, experienced investor, dedicated mentor, and a certified Social Media Strategist. As the President and CEO of Creative Allies, a minority-owned firm that specializes in content creation to enhance brand growth, she has led her team to collaborations with both global and local brands. Creative Allies excels in developing messaging, generating content, defining strategy, and engaging with communities to achieve outstanding brand results.

Amie's academic achievements include a major in Business Administration from UNC-Chapel Hill and a Masters in Organization and Management from Capella University. Her passion for STEM began during her high school years at the North Carolina School of Science and Mathematics in Durham, NC. Amie's diverse experiences, coupled with her academic accomplishments.

Our Sponsors

Presenting Sponsor



Event Sponsor



Silver Sponsors

BlackRock

DIAMOND HILL

INVESTED IN THE LONG RUN



Other Sponsors



Nametag Sponsor



Support & Guidance from

