

DAY 1

9:00 AM - 9:45 AM

Introductions & Workshop Framework

9:45 AM - 10:30 AM

Managing Your Career: 3 Buckets

10:30 AM - 10:45 AM

Break

10:45 AM - 11:30 AM

Managing Your Career: Time, Networking, Selling

11:30 AM - 12:15 PM

Saving & Retirement

12:15 PM - 1:30 PM

Lunch

1:30 PM - 2:15 PM

Taxes

2:15 - 3:00 PM

Business of the Family & Family Business (Frazer Rice)

DAY 2

9:00 AM - 9:45 AM

Estate Planning (Chris Graham)

9:45 AM - 10:30 AM

Investing Fundamentals (Ken Schapiro)

10:30 AM - 10:45 AM

Break

10:45 AM - 11:30 AM

Advanced Investing Strategies

11:30 AM - 12:15 PM

Storytelling (Joe Fried)

12:15 PM - 1:30 PM

Lunch

1:30 PM - 2:15 PM

Money and Happiness (David Geller)

2:15 - 3:00 PM

Money and Happiness (David Geller)