

Max Capacity in General Session 90 – 100. Max in Breakout (25 – 30)

<b>Thursday, March 19, 2020</b>			
10:30 am	Registration Desk Opens		
11:15 – 11:50 pm	Session 1 - Opening Session <b>The Way Forward in Partnership</b> Margaret Franklin, CFA   President and CEO, CFA Institute		
12:00 pm	Buffet Networking Luncheon		
12:50 – 1:00 pm	<b>Welcome</b> (Throw Your Troubles Away)		
1:00 – 1:50 pm	Session 2 <b>DFA Session</b> Topic to be Decided, e.g., Art of Storytelling		
1:50 – 2:10 pm	Partner Showcase Two Sponsors at 5 - 7 minutes each (Kaplan and 1 additional partner)		
2:10 – 2:30 pm	Afternoon Networking with Colleagues & Partners in Pre-Function Area		
2:30 – 3:20 pm	Session 3A Challenges & Solutions Executive Officers and Staff President, Vice President, Treasurer, Secretary, Executive Staff	Session 3B Challenges & Solutions Programming, Outreach (Univ and Comty)	Session 3C Challenge and Solutions Marketing, Branding, Project Funding, Engagement
3:25 – 3:55 pm	Session 4 <b>CFA Institute Board of Governors Panel</b> Connecting the Dots: From the Societies to the Board of Governors		

4:05 – 5:00 pm	<p>Session 5</p> <p><b>Dynamic Networking</b></p> <p>Carlos Davis of Stand &amp; Deliver, LLC</p>
5:30-7:30 pm	<p><b>Off-Site Networking and Cocktails at Dimensional Fund Advisors</b></p> <p>Meet in the Lobby at 5:15 for ground transportation</p>
8:30 – 9:00 pm	<p><b>A Taste in Charlotte</b> – Optional Dining at Local Restaurants</p>

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**Friday, March 20, 2020**

7:30 - 8:30 am	<p><b>Breakfast and Event Registration</b></p>
8:30 – 10:00 am	<p>Session 6</p> <p><b>Invesco Consulting/Oppenheimer</b></p> <p>Presentation</p>
10:00 – 10:10 am	<p>Partner Showcase</p> <p>Two Sponsors at 5-7 minutes each</p>
10:10 – 10:30 am	<p>Morning Networking with Colleagues &amp; Partners in Pre-Function Area</p>
10:30 – 11:20 am	<p>Session 7</p> <p><b>Social Media Strategies and Management (Advanced)</b></p> <p>Don Thompson</p>
11:25 am – 12:15 pm	<p>Session 8</p> <p><b>Peer to Peer Roundtables</b></p> <p>Discussion Forum</p>
12:15 – 12:30 pm	<p>Session 9 - Closing</p> <p><b>Shared Ideas and Wrap-up</b></p>
12:30 – 1:30 pm	<p>Rounding Third and Heading for Home....</p> <p>Luncheon with Colleagues &amp; Partners or Catch Your Flight Back to Home Base</p>

