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ON-THE-ROAD

The Four Seasons, Washington D.C.



Tuesday,
March 8, 2022

TIME	SESSION & SPEAKER
12:00 pm	Lunch
1:00-1:10 pm	Opening Remarks — RJ Shook , Founder, SHOOK Research & Senior Forbes Contributor
1:10-1:15 pm	Invesco's Total CX — George Sweeney , Sr. Vice President, National Sales Director, Invesco
1:15-1:50 pm	Answering the Key Questions You are Getting from Clients t — Brian Levitt , Global Market Strategist, Invesco
1:50-2:30 pm	Income Investing in a Tightening Cycle — Todd Schomberg , Sr. Portfolio Manager, Invesco — Taylor Watts , Sr. Client Portfolio Manager, Invesco Global Senior Loans — Moderator: Brian Levitt , Global Market Strategist, Invesco
2:30-3:00 pm	Portfolio Implementation Ideas — Ryan Sprowls , Wells Fargo Advisors — Rod von Lipsey , UBS Wealth Management — Moderator: Richard Rath , Market Leader, VP & Sr. Advisor Consultant, Invesco
3:00-3:10 pm	Break
3:10-4:10 pm	Changing the Guard — Lisa Kueng , Managing Director of Business Development, Invesco Global Consulting
4:10-4:45 pm	Leading Change — Jeff Grinspoon , VWG Wealth Management — Stacey Crittenden , Merrill Lynch Wealth Management — Moderator: Dave Thomas , Executive Consultant, Invesco
4:45-4:50 pm	SHOOK Ones – My Best Idea
4:50-5:00 pm	Closing Remarks — Frank Berland , Managing Partner, SHOOK Research
5:00-6:00 pm	Cocktails