



# **SOCIAL MEDIA & DIGITAL MARKETING SEMINAR**

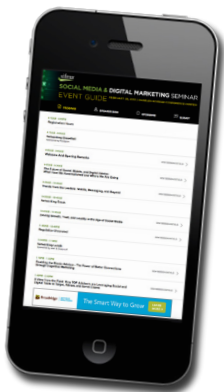
**FEBRUARY 23, 2017**

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# SCHEDULE AT-A-GLANCE

## THURSDAY, FEBRUARY 23

8:15am - 5:00pm

### **Registration Desk Hours**

8:15am - 9:00am

### **Networking Breakfast**

*Sponsored by Proofpoint*

9:00am - 9:05am

### **Welcome & Opening Remarks**

#### **John Maurello**

*Managing Director, Private Client Group*  
SIFMA

9:05am - 9:30am

### **The Future of Social, Mobile, and Digital Advice: What Have We Accomplished and Where We Are Going**

#### **Clara Shih**

*CEO and Co-Founder*  
Hearsay Systems

9:30am - 10:30am

### **Trends from the Leaders: Mobile, Messaging, and Beyond**

10:30am - 10:45am

### **Networking Break**

10:45am - 11:05am

### **Driving Growth, Trust, and Loyalty in the Age of Social Media**

#### **Lisa Kidd Hunt**

*Executive Vice President,*  
*International Services & Special Business Unit*  
Charles Schwab & Co., Inc.

# SCHEDULE AT-A-GLANCE

11:05am - 12:05pm

## **Regulation Unraveled**



12:05pm - 1:15pm

## **Networking Lunch**

*Sponsored by Allen & Overy LLP*

1:15pm - 1:40pm

## **Enabling the Bionic Advisor - The Power of Better Connections through Cognitive Marketing**

**Sharon Greener**

*Vice President of Sales*

Broadridge Financial Advisors, Inc.

1:40pm - 2:40pm

## **A View from the Field: How Top Advisors are Leveraging Social and Digital Tools to Target, Attract, and Serve Clients**

2:40pm - 3:00pm

## **Using Digital Technologies to Protect and Educate Investors**

**M. Owen Donley III**

Chief Counsel,

Office of Investor Education and Advocacy

U.S. Securities and Exchange Commission

3:00pm - 3:15pm

## **Networking Break**

# SCHEDULE AT-A-GLANCE

3:15pm - 4:00pm

**Cyber Risk Trends in Social Media:  
How Firms Can Identify and Mitigate their  
Risk and Protect Clients Against Cyber  
Threats, Fraud, and Data Loss with a Focus  
on Best Practices and Security Technology**

4:00pm - 4:45pm

**Content is Key: Creating and Distributing  
a Content Driven Strategy Across Multiple  
Platforms**

4:45pm - 4:50pm

**Closing Remarks**

**Melissa MacGregor**

*Managing Director and  
Associate General Counsel*  
SIFMA

4:50pm - 6:15pm

**Networking Reception**

*Sponsored by Hootsuite Media Inc.*



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**Lisa Kidd Hunt**

*Executive Vice President,  
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Special Business Unit*  
**Charles Schwab & Co., Inc.**



**Clara Shih**

*CEO and Co-Founder*  
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