

## 2023 Advisor Conferences

Conference	Date / Location	Best for	Registration Site
<b>Exchange: An ETF Experience</b>	Miami, FL Feb 5-8, 2023	Best for independent advisors who want to meet other independent advisors, share best practices and hear about latest trends in ETFs.	<a href="https://exchangeetf.com/">https://exchangeetf.com/</a>
<b>Investments and Wealth Masters Forum</b>	Scottsdale, AZ Feb 5-8, 2023	Conference hyper-focused on planning for intergenerational wealth transfer.	<a href="https://content.investmentandwealth.org/conferences">https://content.investmentandwealth.org/conferences</a>
<b>Orion's Ascent Conference</b>	Orlando, FL Feb 27- March 2, 2023	Large scale conference covering a wide range of topics but primarily focused on how to leverage Orion to drive scale and provide better outcomes for clients.  <i>Penny is speaking here.</i>	<a href="https://ascent.orion.com/event/d969b37c-e2a7-46df-91ac-cf3ecb282f3c/summary">https://ascent.orion.com/event/d969b37c-e2a7-46df-91ac-cf3ecb282f3c/summary</a>
<b>T3: Advisor Technology Conference</b>	Tampa, FL March 13-16, 2023	Financial advisors who are interested in understanding the fin tech landscape and want to network, as well as technology decision-makers at the firm.	<a href="https://www.t3conferences.com/">https://www.t3conferences.com/</a>
<b>Shift: Human-First Financial Guidance</b>	San Antonio, TX March 19-20 2023	A new 2023 conference. Agenda will be focused on a wide range of planning topics with a focus on understanding clients' emotions, behaviors and preferences.  <i>Penny is speaking here.</i>	<a href="https://humanfirst.live/">https://humanfirst.live/</a>
<b>Morningstar's Investment Conference</b>	Chicago, IL April 25-27, 2023	Investment professionals and advisors who want to hear about the markets present, future and past.	<a href="https://www.morningstar.com/events/morningstarinvestmentconference">https://www.morningstar.com/events/morningstarinvestmentconference</a>

<b>ACE Academy 2023</b>	San Diego, CA April 30-May 3, 2023	Large scale conference covering a wide range of topics from investments to technology to behavioral finance. Open to advisors in the US and Canada.	<a href="https://content.investmentandwealth.org/conferences">https://content.investmentandwealth.org/conferences</a>
<b>Snappy Kraken's JOLT Marketing Conference</b>	Las Vegas, NV May 3-5, 2023	Financial advisors who are interested in hearing digital marketing best practices and are keen on networking with other advisors.  <i>Penny is speaking here.</i>	<a href="#">Register for Jolt 2023</a>
<b>Wealth Management Edge Conference</b>	Hollywood, FL May 21-24, 2023	Rivaling <i>Exchange</i> and combining three separate conferences ( <i>RIA Edge</i> , <i>Wealthstack</i> and <i>Inside ETFs</i> ), this conference is for advisors who are interested in hearing the latest in ETFs, financial planning, and practice management.	<a href="https://informaconnect.com/edge/the-edge-events/">https://informaconnect.com/edge/the-edge-events/</a>
<b>FPA Northern California</b>	San Francisco, CA May 30-31, 2023	Experienced financial planners who want to high-impact content and are genuinely interested in attending workshops and sessions.	<a href="https://www.fpanorcal.org/">https://www.fpanorcal.org/</a>
<b>Future Proof</b>	Huntington Beach, CA Sept 10-13, 2023	For all financial professionals interested in an immersive experience that emphasizes networking and learning best practices in a "music festival style" venue.  <i>Penny is speaking here.</i>	<a href="https://futureproof.advisorcircle.com/">https://futureproof.advisorcircle.com/</a>
<b>XYPN Live</b>	Atlanta, GA Sept 19-21, 2023	Fee for service financial advisors who want to network and learn from their peers about everything from scaling advice to better leveraging planning tech resources.	<a href="https://live.xyplanningnetwork.com/">https://live.xyplanningnetwork.com/</a>
<b>Riskalyze's Fearless Investing Summit</b>	TBD Fall 2023	Financial advisors who are looking to attend a conference with a bit of everything, practice management, financial planning, technology, and investment management.	TBD



		<i>Penny is speaking here.</i>	
<b>eMoney Advisor Summit</b>	TBD Fall 2023	In-person or virtual summit for financial advisors looking to advance their knowledge in financial planning and in leveraging eMoney to deliver value to clients.	TBD
<b>Schwab's IMPACT Conference</b>	TBD Fall 2023	Large scale conference for all advisors and firms affiliated with Schwab. Content spans a wide range of topics including practice management, investment management and financial planning.	<a href="https://impact.schwab.com/">https://impact.schwab.com/</a>
<b>Investment and Wealth Institute's Wealth Forum</b>	New York, NY Nov 28-30, 2023	Ideal for advisors and professionals responsible for constructing and managing portfolios.	<a href="https://content.investmentandwealth.org/conferences">https://content.investmentandwealth.org/conferences</a>
<b>FPA National Conference</b>	TBD Dec 2023	Large scale conference for financial planners looking to advance their knowledge and acumen in the discipline of planning.	<a href="https://ac.financialplanningassociation.org/">https://ac.financialplanningassociation.org/</a>

## 2023 Recommended Resources

### Reading & Subscriptions

[Kitces.com](#) (daily reading)  
[Financialplanning.com](#) (daily reading)  
[Wealthmanagement.com](#) (daily reading)  
[Fiducientadvisors.com](#) (daily reading)  
[Finding Joy](#) (blog)  
[The Belle Curve](#) (blog)  
[The Psychology of Money](#) (book)  
[Atomic Habits](#) (book)  
[Ask: How to Relate to Anyone](#) (book)  
[The Gap and the Gain](#) (book)

### Podcasts

[Standard Deviations with Dr. Daniel Crosby](#)  
[Financial Advisor Success Podcast with Michael Kitces](#)  
[Tortoise Quicktake](#)  
[Invest Like the Best with Patrick O'Shaugnessy](#)  
[Market in Motion Podcasts](#)  
[The Compound & Friends](#)

### Coaching and Development

[Building the Behavioral Advisor](#)  
[Magellan Mastermind](#)  
[Limitless FA](#)

### Community

[Advisor Growth Community](#)  
[Female Advisor Network](#)  
[The Renew Community](#)  
[Savvy Ladies](#) (non profit)