

November 12-13, 2024

LOCATION: OPPENHEIMER & CO. INC.
85 BROAD STREET 22ND FLOOR
NEW YORK, NY 10004

TUESDAY, NOVEMBER 12, 2024

10:45am	Welcome	Daniel Mullen Executive Director, OAM
10:50	The Power of Oppenheimer Thinking	Joan Khoury CMO, Oppenheimer & Co. Inc.
11:05	Discover Tax Efficiency at Oppenheimer	Meghan Ramirez Managing Director, OAM
11:20	Inside the 2024 Election	Bill Bird Director of Equity Research, Oppenheimer & Co. Inc.
11:35	Where We Stand: Tax Exempt Fixed Income	Ozan Volkan Managing Director, OIA
11:50	Lunch	
12:00	1031 Exchange 101	Joe Werner JLL
12:50	Tax Managed Solutions: Direct Indexing and Exchange Funds	Chris Webb Eaton Vance
1:20	Break – Picture Perfect: LinkedIn Photo Opportunities	
1:30	Become Uncommon	Brian Gleason Uncommon Elite
2:15	The Referral Code	Lisa Kueng Invesco
2:45	Break	
3:00	Anatomy of a Recession	Corey Hardie ClearBridge Investments
3:30	State of Accounting Referral Industry	Dr. Jay Nisberg
4:00	Top Actionable Ideas: Peer Discussion	
4:45	Closing Comments	
6:00pm	Cocktails and Dinner	

WEDNESDAY, NOVEMBER 13, 2024

7:30am	Breakfast @ 85 Broad	Oppenheimer Executive Committee
9:00	New York Stock Exchange Tour <i>Photo opportunities to follow</i>	
12:45	Depart New York Stock Exchange	