

Transcript

Better conversations. Better outcomes.

Episode 73 – Designing the best approach to conferences

Steve Sanduski - Do go to a session that is totally outside of your comfort zone or something that you may learn something totally new. Then also, do find a way to come away from the conference motivated or inspired. So I think if you're going to take time away from the office, you need to get recharged as well. So always find a way, whether it's speakers, whether it's people you're networking with, or if you're going to a city like Washington, D.C., we came here early and did some sightseeing. So really take advantage of the geographic location outside of the conference and you can learn some new things from that as well.

Emily Larsen - Welcome to *Better Conversations. Better Outcomes.* presented by BMO Global Asset Management. I'm Emily Larson.

Ben Jones - And I'm Ben Jones. And on this show we're going to explore the world of wealth advising from every angle, providing you with actionable ideas designed to improve outcomes for advisors and their clients.

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Emily Larsen - It's the start of the New Year, and if you're like many of our listeners, you're flooded with requests to attend various conferences. Now can be a great time to sit down and be intentional and proactive about your conference attendance. It can be useful to determine ahead of time your objectives, skill gaps, or development plans for the year and then decide which conferences can help you achieve those objectives.

Ben Jones - Regardless of your current approach to conferences, on this episode we aim to give you actionable ideas about how to evaluate and choose conferences. Then once you've chosen a conference, how do you maximize that conference to get the best outcome for you and your team? Now we're going to try to tackle this in three different parts. First, how to prepare for a conference. Second, how do you make the most of that conference while you're there? And third, what do you do post-conference -- because the follow-up's where the magic really happens.

Emily Larsen - You're going to hear lots of actionable ideas like the one you heard at the top of the show today. That was Steve Sanduski returning for a second appearance on the show. Check out episode 23 if you want to hear his first. He's the founder of Belay Advisor and host of the podcast *Between Now and Success*. In addition, Dennis Morton and Kathryn Brown, founders and principals of Morton Brown Family Wealth, also joined us for a round table discussion.

Ben Jones - We held our round table discussion offsite during Impact 2018 in Washington,

D.C.. Our guests were kind enough to make time to join us for this round table in between maximizing their own conference attendance. So maybe Dennis, we can start with you. But from a founding principal's perspective as you probably get invited to lots of conferences every year. How do you decide which conferences you're going to attend?

Dennis Morton - So, a lot of times it's dependent upon the life cycle of our business. So for example, Katie and I launched Morton Brown Family Wealth in April of this year. So we're very much at a stage where we've recently adopted technology platforms, we're in a high growth phase, so we're really looking at the types of conferences that will feed into where we are in the life cycle. We like to find conferences where we can discern where the industry is going. There's a lot of change happening and we want to make sure that we're not fighting against the tide, so to speak.

Ben Jones - And Katie, so when you guys think, and as you launched your firm and you thought about your conference strategy, is it strategic or is it just reactive as invites come up?

Katie Brown - It has to be a little bit of both. You have to leave some room to be reactive, but I think heading into the conference, we wanted to make sure that we were reaching out to some of our different strategic partners, our platform partners, make sure that we have some meetings already scheduled for individuals that we work with throughout the country. So there's some work that goes into it. But, I think one of the great things about conferences, and especially a conference like this, is that you can sit down at lunch and meet somebody incredibly interesting that you want to continue that conversation with. I think going in with a mindset of, there's so much to learn, so many different directions that you can take the conversation. You have to leave some flexibility within the schedule to allow for that.

Emily Larsen - So, how do you evaluate which conferences you want to attend and who from your team should attend?

Dennis Morton - I think big picture, you have to look at the different models that you're focusing on your business. So we talked about the four different aspects of our business. Financial planning, investment, client service, and business development. So if we're trying to approach each one of those strategically for 2019, we want to come in and say is this conference going to be comprehensive and touch on all of them? If so, how do we find the speakers or the topics that are going to be of interest? Or is there a way to maybe attend a specifically investment related conference that's going to support all of that and just one of those pillars individually. This is definitely a more comprehensive event for us.

Ben Jones - When you think about this, how do you determine if you should attend, if Katie should attend, or if someone on your staff should attend a conference?

Katie Brown - Well I think this is a good example where -- and fortunately, we're not far away. So we're from Allentown, Pennsylvania. So this is driving distance for us, which works out very nicely. We also have some clients in the area too and so this is a great example where I am here for the duration of the conference and Dennis is here for part of the conference, but then he's also going to head over to client meetings. He's going to do a few other things. So we really have to look at what is the best use of our time individually and making sure that we are in the best place for both our firm and ourselves and that we can gather the necessary knowledge going forward.

Ben Jones - I want to ask both of you this, but we'll start with you first, Katie. In what ways do

you feel conferences can make you a better advisor, business owner, and person?

Katie Brown - It really comes down to the learning. It does. And sometimes it's learning what a product offering is or learning what a platform offering is, but it's also -- it's learning from other people's experiences and talking to other advisors. I love seeking out advisors that are a couple of steps ahead of us, who've maybe been in the business a little bit longer, and learning from how they grew and how they've built their firms, their processes, their staff, and their team. Taking that knowledge and being able to apply it to our firm and maybe tweaking it, that's the beneficial part.

Dennis Morton - The first example, I thought about this last week, is the first time I learned that there were such a thing as podcasts was at a conference. And someone referenced it, I said I'm going to go listen to that. Now we're trying to get off of the addiction, but we've just been exposed to voices in the industry that are helping us be better every day. But I also think you identify, as Katie said, people who are a few steps ahead. I think specifically for where we are in the business right now, where we're trying to build the engine for future growth. I remember at a Schwab conference a few years ago hearing Barry Glassman talk about every once in a while you pause to reflect on what is happening inside the business that's going to sustain the next level or achieve that next iteration of what you're going to be. I think that's where we are right now, but that concept stuck in my mind and it's because you sit in the conference and can say, at some point this is going to be me.

Ben Jones - Now Steve, you attend a lot of conferences, both as a presenter/speaker as well as kind of a lifelong learning. So I'd love to hear a little bit about how you determine which conferences you're going to attend.

Steve Sanduski - Well, I like to attend one comprehensive conference like Schwab each year. So that way there's all different kinds of sessions that I can choose from and whether I want to learn about marketing or sales or investing or where the industry seems to be heading, I can go to a conference like Schwab and capture all that. But then I also like to go to one or two conferences each year that are outside of our industry. Because I think one of the ways that we can all grow is we've got to get out of the financial industry and we've got to go to other industries and learn what are they doing that is making them be successful and then how can we take some of those ideas, maybe tweak them a little bit and make them work within financial services. Technology, for example is a great one where sure we have a lot of technology in our business, but the best technology isn't necessarily going to originate in financial services. So by going to a tech conference as an example, we're going to pick up some things that we might be able to move in to our industry. But yeah, I typically will go to at least one or two conferences outside of our industry just so I can pick up some ideas and try and connect the dots.

Ben Jones - I like that. Now, it's good advice, do you mind sharing maybe one or two of the ones you been to in the last year?

Steve Sanduski - Sure, yeah. So earlier this year I was in New York and my daughter and I went to a conference called 99U and it was put on by Adobe. It's just all about creativity. So these are speakers that unlikely you're going to see them at a financial conference. So it was really enjoyable. It was really enjoyable to go with my daughter. So this is her first "professional conference", so she wanted her dad to go with her. So it was a lot of fun. Yeah, but it was all about creativity, there was -- I went to one session with some people from Google and we did an exercise on how Google uses the user experience to kind of permeate their whole organization. So we had some hands on exercises, we had some different cards that we were

playing with in small group exercises. So it really gets you out of your comfort zone, it causes you to meet people that you otherwise would not meet, and make some connections that way. So yeah, that's a perfect example of one I went to earlier this year.

Ben Jones - I like that. Now as a coach, how do you suggest that advisors think about their conference strategy with respect to their practice?

Steve Sanduski - Yeah, well I think you have to figure out what do you want to get out of it? Is there something specific that you need to learn? Oftentimes, advisors will say well I need to enhance my technology stack. So they may go to a conference specifically to learn more about the technology piece. So I think that's one thing is if you've got a specific thing that you need to improve, what's the best conference to go to that can help you learn that? That's certainly one. Another thing I like to do is walk the exhibit hall. So early in the conference, just go up and down every single aisle so you can get a sense for who's there, what looks interesting, and then make a note to go back and visit some of those that seem interesting. But at least you're going to know who all is there, I think is another good strategy to start with.

Ben Jones - I like that. I've got to ask this question. We have some lifelong learners on our team and some of them have discovered podcasts like you, Dennis. Pat Bordak on our team really wanted me to ask the question, with all of the on demand learning available, why does anyone spend the time to go conference in person anymore?

Dennis Morton - I think it really comes down to the community. Well, I think we want to find people who are going to introduce those other sources -- because I'm very much capable of getting into a rut very quickly when it comes to the information that I digest and the sources that I take in. But just to come in and hear somebody talking about something, even on the periphery that I hadn't thought about before, there's real value in that. There's also the idea that we want to start developing that next generation of financial advisors, next generation of people who have that higher standard and want to succeed in the business. I think sending them out into a conference where they can find out that they're part of a larger community, that it's not just being part of Morton Brown but that there's a whole community of people doing the same thing, I think it's really important. It's good validation because you can get lost in that sometimes.

Katie Brown - I think the advantage of a conference over online learning for instance, a number of different things. But it's really hands on. I think with a conference, you can think outside of the box or you have tools and people around you to help you think outside of the box. If you're doing online learning, you might think of it as one type of application. But going to a conference, you realize there are so many different ways that you can apply the knowledge that you're receiving, whether it's on the technology front, investment front, or client service, whatever the case may be. It's learning different ways to apply that knowledge that you can't necessarily pick up.

Steve Sanduski - I would also say that when you go to a conference, it forces you to be focused on that activity. Whereas with on demand learning, and I absolutely love on demand learning, whether it's podcasts or online courses, is that you can always say, I can listen to that later or you get interrupted and you don't feel bad being interrupted and I'll get to that later. But when you come to a conference, you're making a commitment -- a time commitment and a financial commitment. So I think speaking for me, it forces me to really be present and I'm in learning mode, I'm in conversation mode, I want to meet people, and I'm going to take two, three days to do that. So I think that also is one of the benefits in addition to the whole community, which I

totally believe that the more we have technology in our world, the more we want to still have community too.

Ben Jones - Okay, so let's say that you've got your strategy planned, you know the areas of priority for both you and your firm, and you also know which conferences you're going to attend to try to extract knowledge out of. Preparing in advance for a conference can have a significant impact on whether or not you maximize that event.

Katie Brown - One of the first things is I start thinking about who else is going to be there and who can I connect with that I know I want to connect with. So whether it's strategic partners that we're working with, Steve for instance, it was wonderful to connect with him here. We also have a couple other partners that we work with as well -- so setting that meeting schedule ahead of time leading into the conference. The other thing is going through the list of speakers and the list of content and really building out the schedule, finding out what's going to apply to our firm and what we're trying to do, but then also, who do I know to be a great speaker that I just really want to listen to and I want to find out where they're headed, where their thought process is, and where the industry is going from their perspective.

Ben Jones - One tip that I've used, I don't want to sound like a stalker here, but from my perspective what I do is I build either an Evernote or a Word document and then I make a top 10 hit list. From that hit list, I go to their LinkedIn profile and I clip their picture so that when I'm carrying my phone with me I can recognize faces because I'm more of a facial recognition person than a name tag reader. So that makes it so I can just check off as I go through, okay I found eight of my 10 people or seven of my 10 people I was going to find during this conference. Anything you do, Steve?

Steve Sanduski - Not really that hasn't already been talked about. The one thing that I would ask for all these conference organizers is to record your sessions and make the sessions available after the fact for the conference attendees. Because oftentimes there's competing sessions that I want to go to and I have to pick one. But they don't always make the recordings available. So I wish they would and make them in an MP3 format so I can listen to them on my phone on Wi-Fi and so that would be one thing that I would ask the conference organizers listening to this.

Ben Jones - That's interesting you say that, that's a great lead in to the next question I had which is you guys get the luxury of having two people from your firm here at this particular conference, and maybe that happens at other conferences. But how do you determine what sessions you're going to attend and do you ever determine you should divide and conquer so that you can pick up two sessions you wanted to hear?

Dennis Morton - I'm thinking back to the benefits historically. I think there's some times when we have sat in the same session and heard the same thing with different ears and that's been helpful. But other times I think it's helpful for the person who does have the more in depth knowledge or that's more their focus to emphasize that. But usually it is a matter of the priorities of the firm. So if we say this is one of the top three pressing questions that we need to figure out, maybe it's better to have both of us there versus one. One area where I think we have had success in having two sets of eyes and ears in a session is when it's related to leadership. I think that's something where in addition to all the planning and advisory related content, we're both in a position to be leaders in the firm and hopefully leaders in the industry. Listening to things that can help us to develop as a leadership team and individually as leaders has always been helpful. It kind of gives us a common language to talk in our own evolution as

managers.

Ben Jones - I want to ask this question because you guys are both practitioners. So Steve already mentioned you come down to a conference, you're focused on learning about things relative to your clients' portfolios, your business, and maybe even some personal development or areas of interest. But how do you build in flexibility or time for responding to client inquiries? Because those don't stop just because you're at a conference.

Dennis Morton - So at a conference like this, as Katie mentioned, she's going to be handling most of the sessions while I'm interspersing client engagements in the region and also doing some of the management outside of the firm. Then I kind of intermix time on the floor to talk to some of our technology vendors. There's always a balancing act there and dividing and conquering.

Ben Jones - When it comes to e-mails and voicemails, etc., do you let your clients know that you're attending a conference and out of the office or do you just kind of treat it as business as usual?

Katie Brown - We let them know that we're out of the office just in case there's a delay. As much as possible we want to make sure that we're getting responses out to them quickly. But if there is a delay, and clients are fine with that. They're respectful of that. But also, I think it's frequent check-ins with the office and making sure that we're delegating as much as we can. So if there's something that pops up from a client that we don't need to handle personally, we want to make sure that we get it in the hands of somebody that can take care of it.

Ben Jones - Now Steve, when you think about conferences and you think about the folks that you coach, do you feel that advisors need to define what success looks like for that conference upfront or is that taking it a little too far?

Steve Sanduski - Well I think some people are going to do it either way. So some people like you want to have their top 10 hit list and are very methodical about it. I'm less methodical about it. I leave some room for serendipity. I think one of the fun things about attending a conference is that you will just randomly run into somebody. Like I've been in the industry a long time as you have as well, and sometimes I'll run into somebody that I may not have seen for a long time. So it's just really fun to reconnect with people that you've known for a long time. So I think having some serendipity. I don't always go in with really hardcore objectives like I'm going to do this, this, and this. I've got some general ideas that I want to do. But then I also leave room in the schedule for things to just happen and I think sometimes that's where the magic happens is when it is unexpected.

Ben Jones - When you get to the end of a conference and you haven't defined success, how do you know if it was a successful conference or not?

Steve Sanduski - Well, I'll just know. It's more of a --

Ben Jones - More qualitative?

Steve Sanduski - A qualitative feeling, yeah, where I'll feel like this I really worthwhile, I learned some things. I also look at how many notes I've taken. So I'm an analog guy when it comes to taking notes. I've got my little spiral notebook here. So I'll be taking notes at the different sessions and if I've got 2, 3, 4, 5 pages of notes, then it's a pretty good conference. On the

other hand, if it's sparse, well then I know, maybe this wasn't so great. Also, it's a function of did I make some connections, did I renew some existing relationships, did I make some new relationships, do I have some follow-ups from this event, did I generate some potential podcast guests? Those are all factors that go into my consideration for how successful it was.

Emily Larsen - You've arrived at your conference. It's busy. There are a million things you could attend. So how do you make the most of it while you're there? All of our guests take copious notes from sessions and key notes, whether digitally or on paper. Ben asked our guests about how they deal with booths and vendors.

Katie Brown - I like to walk the entire floor at least once. I might -- I don't stop at every booth, but I definitely like to get the lay of the land. Every once in a while something catches my eye that I say oh, I didn't realize that might be here or I have an interest in learning something new in a different area. So I think there's a benefit to just seeing what's out there. But then I have my -- one of the other things in advance of coming to the conference is to go through the list of everybody that's going to be on the floor and make sure that I star or I highlight the ones I want to stop by so I know where their booths are at and make sure that when I actually have time to spend on the floor, because sometimes you only have five minutes before breakfast, but if you have 45 minutes around the lunch hour, then I want to build in some of those conversations.

Ben Jones - Now, I'm curious about this. So you walk down the aisle. Some of these vendors go to great lengths to put some sort of shiny objective to draw you in. I'm just curious, what are the things that either of you think are important or do draw you in? What are those items?

Katie Brown - Alright, so I have to admit what drew me in this morning, running socks. Laugh. I'm trying to remember what firm had them out there, but somebody had running socks. I saw them and -- yeah, so.

Dennis Morton - And you ran toward it.

Katie Brown - I did! I did. Yes. I thought that was a little bit unique. Other than that, if there's something that catches my eye that maybe my kids will like, then I'll grab something for them on occasion. But...

Ben Jones - Steve, how do you keep track of all the reference materials that you might pull? I mean some of these people bring piles of literature and I'm not sure any of that makes it home. But how do you keep track of the ones you want to take home?

Steve Sanduski - Well, I typically don't take home their material because everything is on the Internet. So I don't need to take some paper based copy back home with me. But what I will do is I want their business card. Then I write a note on the business card with my little cryptic message on what do I want, do I need to follow up with them, do I need to talk to them about such and such thing. So I'll write a little note on the business card. Then when I get home, I'll put the business card into my CRM and I'll put a note if I need to call them or whatever my next action is, and then that becomes a digital next action. So yeah, I just take the business card.

Ben Jones - Now, we've all talked a little bit about this but I continue to hear people say that networking continues to be kind of one of the biggest values of going to a conference. So a lot of conferences try to build in free time or "networking time", happy hour for people to try to mingle and whatnot. Maybe walk me through a little bit like how do the two of you approach the topic of networking and meeting new people?

Dennis Morton - I think it starts with connecting with the familiar faces -- which at this stage of our careers is interesting because those people are in different roles than they were in maybe five or seven years ago when we first met them. We're all migrating through in different leadership roles, different stages of business. So I think the first thing you want to do is say the people who we've come to know and like, where are they, what are they doing, and what's new in their lives? But then also expanding upon that. As Katie said, a lot of it's happenstance. Sitting down and being open to having a conversation at lunch or who you're sitting next to at a particular session. Because as you said before, there's a reason why people select sessions, why is this important to you? And making a friend.

Ben Jones - I like that question, why is it important to you? Do you have any other great questions to just kick off a fresh, random happenstance introduction?

Katie Brown - I don't know if I necessarily kick off with this question, but early on in the conversation, I like to ask people what do you do for fun? What do you like to do outside of the office? That typically leads into a great a conversation.

Ben Jones - I like that. Steve?

Steve Sanduski - Well in terms of networking, a couple things. So one is as an ice breaker, oftentimes I'll ask at a conference, what's the one thing that you're hoping to take away from this conference? What's the learning that you want to take away? That usually leads to some good conversations. Then the second thing I would say about networking is the meal times. I find those are oftentimes when I have the best conversations, whether it's breakfast or lunch. What I would recommend is when you've got your plate of food and you're deciding where to sit -- and I've made this mistake -- I'll sit down at a table where they had just finished eating. So, they get up and leave and I'm like oh, is it something about me? So I will purposely look and see who just sat down and has a full plate of food there so I know they're going to be there for a while. But I find that the meal time is a really great time because people are a little bit relaxed, they've got some time, they're not trying to jump to the next session, and had great conversations during meal time. So don't skip the meal time, don't go for the last 10 minutes of lunch and grab and go kind of thing. That's a great time for networking.

Ben Jones - Steve, what do you think some of the biggest pitfalls or detractors you see for advisors in their ability to optimize that conference experience?

Steve Sanduski - Well, I'll walk and I'll see people -- the conference is going on and they're hanging out in the hotel lobby and they're sitting on their phones scrolling through Facebook or something. So they're not really taking advantage of the conference and not taking advantage of the networking, or maybe they're sitting by themselves at the lunch break instead of inserting themselves and trying to have a conversation with somebody. So really it's just not taking full advantage of your time here away from the office to learn and connect with others.

Ben Jones - While we're on the subject of pitfalls, do any of you have any hard and fast dos and don'ts at conferences that you'd like to share.

Katie Brown - I'd say the biggest do, and this goes back to everything we've been talking about today. But do talk to strangers. Sit down and just start a conversation. It doesn't matter if they're another advisor, it doesn't matter if they're somebody from the expo floor or somebody hosting the event. But everybody has something to share.

Dennis Morton - I'll take a don't. Don't concentrate just in your area of specialty or your particular focus area when selecting sessions. The sessions that are on the periphery I think have been some of the most valuable ones for me. Really opened me up to, as I said before, not just being an advisor but being a leader and those are great ones to sit in on.

Ben Jones - So now you arrive back home after a successful conference experience and your inbox is full, your voicemails are full. You're catapulted right back into the demands of your work and personal life. But what can you do post-conference to ensure that you retain everything that you've learned and take action on all those good ideas that you wrote down?

Dennis Morton - I think this comes back to that definition of success. And I don't think it's success unless we do some sort of after action review where as a team we sit down and talk about what was learned and what are the action items. But also that it didn't happen in a vacuum; that we share with our team; that we share with our clients; take credit for trying to go out there and expand upon what we know and what we can deliver. If we can disseminate that amongst our team and clients, then I think that's really a good definition of success and an important first step when we get back after the conference.

Steve Sanduski - What I try and do is I try and block out the day before a conference and the day after a conference and not have any fixed appointments. Now, I can't say that that always happens exactly that way, but I try and minimize the number of scheduled activities that I have the day before and the day after. So then what I'll do is that day after the conference is I'll review my notes. Sometimes what'll happen is the note did not age very well, where it sounded really good in the moment but then when I go back and look at it the next day it's like, that wasn't a great one, what was I thinking? So that won't make it into my digital note library. So I would say if you can, have few appointments on the day after the conference, read your notes again, and then figure out what are my action items from this. Put it in your permanent note library, however you do that, and then get rid of your notes if you want. So that way you really have to leverage the event. Because the worst thing you can do is go to the conference, you come back first thing in the morning and you've got a full day of appointments and you're not able to follow through on what you just learned at the conference.

Ben Jones - What about follow-ups? You've all mentioned you've got notes on business cards and whatnot for follow-up. How quickly do you follow up and how much of a priority is that relative to all the other stuff you have to do as a leader and a business owner and a client facing individual?

Katie Brown - If I can fit in even just an hour in my day during the conferences, maybe just before you go out to dinner, and shoot out a couple of notes saying hey, great to see you today, love to connect on LinkedIn, whatever the case may be. Some of those I want to get out ahead of time. Other ones -- and there's a prioritization to it. So other ones might be a follow-up because of a specific initiative in the firm. So we'll take the time to figure out, alright what's the best follow-up and timeline for that? So it's prioritizing the ones that we can do quick and right away, and then the ones that need a more robust response later.

Ben Jones - I like the idea of doing it during. I always have that intention and it ends up happening like five days later. Laugh. So, I'm a great example of how that intention does not always align with my execution. What about you Steve?

Steve Sanduski - Well, maybe I'm rationalizing this, but I actually do typically wait two, three

days after the conference to follow up with people that I connected with at the conference. The reason being is that if they're at the conference, they're going to be super busy. My e-mail might start piling up because maybe they're not going through their e-mails really fast at the conference. So I like to give them two or three days, and also maybe they're taking an extra day or two, travel or whatever. So I want to make sure they're back in the office. So I typically will wait two or three days before I follow up with someone from a conference.

Emily Larsen - Going to conferences can be tiring. Especially if there are long days with activities into the evening and extensive travel involved. But they can also be extremely rewarding. We asked Katie what it feels like when you've returned from a successful conference.

Katie Brown - Inspiring. It is very inspiring. When you leave the conference, you say, the content was great, the people were great, the sessions were great, the food was good. You just, you're excited. You're excited to go back to the office and you're excited to say hey, look at all these great things that we can do. Then it comes down to the prioritization of it. But it's an energy, a great energy.

Ben Jones - Steve, if you were going to summarize our entire conversation in one or two sentences, what would they say?

Steve Sanduski - That going to a conference is great because of the community. It's great for the learning, it's great for the networking. Make sure you put yourself out there and take full advantage of that.

Ben Jones - Wonderful. How about you Dennis? If you were going to summarize the entire conversation in one or two sentences, what would you say?

Dennis Morton - I think that this is about finding and building a community around us to make sure that we're part of a conversation that's greater than ourselves and learning where the industry is going.

Ben Jones - Katie, if you could write your own warning label for our conversation today, what would that warning label say?

Katie Brown - Go in with your own plan and your own objectives. Make sure that you're seeking what's going to apply best for you.

Ben Jones - There were a lot of ideas shared today that you can take action on. To name a few, know your firm's areas of focus and priority for the year. Attend a non-industry conference or event. Know who you're trying to connect with when you're at those events. Maybe even make a contact hit list. Never eat alone. Block out the day after the conference to digest the notes and make a plan to implement those good ideas. I'd really encourage you to pick one or maybe all of these and see how they make a difference in maximizing the next conference that you attend.

Emily Larsen - Steve, Dennis, and Katie, thank you for making the time to share your experience and perspective on the show today. Listeners can find more about their work on our show notes page for this episode along with the transcript that is packed full of the tips they shared. The team at BMO hopes to see you at one of the many conferences in the year

ahead. Shoot us a note and let us know what conferences you have on the agenda this year at betterconversations@BMO.com.

Ben Jones - Thank you for listening to *Better Conversations. Better Outcomes*. This podcast is presented by BMO Global Asset Management. To access the resources discussed in today's show, please visit us at www.bmogam.com/betterconversations.

Emily Larsen - We love feedback, and would love to hear what you thought about today's episode. You can send an e-mail to betterconversations@bmo.com.

Ben Jones - And we really respond.

Emily Larsen - We do.

Ben Jones - If you thought of someone during today's episode, we would be flattered if you'd take a moment and share this podcast with them. You can listen and subscribe to our show on Apple Podcasts, or whatever your favorite podcast provider is. And, of course, we would very greatly appreciate if you'd take a moment to rate or review us on that app. This show and resources are supported by a very talented team of dedicated professionals at BMO, including Pat Bordak, Gayle Gipson, Matt Perry, Derek Devereaux. The show is edited and produced by Jonah Geil-Neufeld and Annie Fassler of Puddle Creative. And these are the real people that make this show happen, so thank you. Until next time, I'm Ben Jones.

Emily Larsen - And I'm Emily Larson. From all of us at BMO Global Asset Management hoping you have a productive and wonderful week.

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