

WealthManagement EDGE



Over 1,500 leaders in the financial services space recently gathered in Florida for WealthManagement's four-day premiere industry event, EDGE. Attendees gained valuable insights and outlooks from global influencers, trendsetters, CEOs, and industry leaders. While there were more than 100 events for attendees to enjoy throughout the conference, we've narrowed down our top 10 favorite sessions.

01

EDGE VISIONARY FIRESIDE CHAT WITH JASMINE JIRELE

In this one-on-one discussion, Jasmine Jirele, President and CEO of Allianz Life Insurance Company of North America, discussed the stress retirees have about making their money last in retirement. Jirele shared how client concerns are being exacerbated by recent market volatility and economic challenges, such as persistently high inflation. Throughout this session, Jirele emphasized the opportunity advisors have to differentiate themselves by finding ways to bring guaranteed lifetime income solutions into the planning equation for clients nearing retirement.

RIA CEO ALL STARS PANEL

EDGE brought back one of last year's most popular sessions, the RIA CEO All Stars Panel, featuring female founders and leaders including Lisa Crafford, Kay Lynn Mayhue, Shannon Eusey, and Heather Fortner. During this session, each panelist shared their unique stories and experiences in being a leader, what it looks like to lead a sizeable team, and how their roles have evolved over the years. They touched on topics including the challenges with executing a successful succession plan, addressing financial issues within the firm head-on, connecting with their teams in an effective manner and scaling effectively through M&As and partnerships.

02

03

WOMEN IN ETFS BREAKFAST WITH JOHAN GRAHN

In the conference's ninth annual Women in ETFs Breakfast, Allianz's Head ETF Market Strategist Johan Grahn joined panelists to discuss his experience in the ETF market. The panelists focused primarily on how different ETF providers came to the market and what they're seeing as trending in the marketplace currently. Throughout the session, Grahn shared his insights on the benefits and challenges of launching an ETF with the backing of a large institution, particularly as his experience compares to the experience of other panelists who came from varying firm backgrounds.

PLAYBOOK FOR HUMAN-CENTRIC ADVICE WITH BRIAN PORTNOY

04

Buzzwords like "behavioral finance," "behavioral economics" and "psychology of money advice" are growing more popular by the day within the financial services industry. According to Portnoy, advisors recognize the importance of this aspect of financial advising because client relationships can't be commoditized. In his talk, Portnoy explained how advisors can better understand who they're working with not just as a client, but as an actual human being. To do this, he laid out the framework that advisors should use to organize their minds and structure their practice around putting human-centric advice into play.



05

ALTERNATIVE ETFS WITH JOHAN GRAHN

Allianz's Head ETF Market Strategist, Johan Grahn, joined a group of panelists to discuss the growing interest in alternative ETFs, Allianz's lineup of solutions, and the challenges advisors have with incorporating alternatives into client portfolios. Grahn and his panelists zeroed in on the primary issue advisors and investors have with alternative ETFs, which is understanding what's going on within categories of alts. Grahn explained this is why he and the team at Allianz develop alternative ETF solutions that take a simple, clean approach to creating predictability for investors by incorporating caps and buffers.

WHAT'S UNDER THE HOOD: THE BENEFIT OF BUILDING YOUR OWN ETF

06

In this panel featuring a set of ETF-focused financial professionals, panelists shared an in-depth discussion on what it takes for advisory firms to launch an ETF and the challenges that come with it. Creating an ETF can help meet client needs, but as all panelists pointed out, it's something that requires careful planning. Managers will need to consider a number of factors including who they use as providers, how they'll protect their enterprise value, and what it'll take to raise the seed capital necessary to launch.

07

RETIREMENT INCOME PLANS FOR THE PRINCIPLED INVESTOR WITH HEATHER KELLY

Allianz Life's Executive Vice President Heather Kelly joined panelist Michelle Richter-Gordon to discuss what the retirement income landscape is like in the aftermath of Covid-19. They identified a few key issues advisors are facing right now and discussed how they can work to help clients feel confident in retirement. Beyond technical assistance, clients who are in the decumulation stage need ongoing guidance and assurance that their money will last throughout retirement, said Kelly. To meet these evolving needs, advisors should consider solutions designed to mitigate downside market risk and help clients generate guaranteed income during retirement.

FIRESIDE CHAT WITH AARON KLEIN

08

In this intimate, one-on-one interview, Nitrogen co-founder and CEO Aaron Klein shared a behind-the-scenes look at the recent rebrand Riskalyze rebrand. He explained what it was like to embark on a top-secret 10-month-long rebrand process, and why it was necessary in the first place, especially considering how well-known the brand had become over time. He explained that while the company had done an extraordinary job over the last decade building an end-to-end growth platform, the financial services industry continued to put them in a box based on their initial risk-focused products and services.



09

RISK MITIGATION WITH MATT OHME

In a panel discussion focused on risk, Allianz Life's Senior Vice President Matt Ohme CFP®, CIMA®, CLU shared what Allianz Life is doing to help advisors manage risk more effectively. Ohme shared that in recent years, his team has focused on empowering independent RIAs by developing Buffer ETFs and tech-enabled, commission-free products. Ohme and his team work with RIAs to integrate those solutions into their practices through the firm's own tech stack. The panelists also discussed the use of fintech in helping advisors improve both compliance efforts and overall operational efficiency.

WINNING THE BATTLE FOR RIA TALENT

10

Last but not least, we come to a word we heard a lot at EDGE: talent. In an engrossing conversation, Executive Search Professional Megan Bowen and Founder of Herbers & Company Angie Herbers discussed the hiring landscape facing RIAs today. Herbers discussed how talent acquisition should be part of an overall growth strategy, rather than just hiring as needed. Bowen touched on the more "creative" approach firms are taking to remain competitive in attracting and retaining advisors. It's clear that in today's world, having the best talent goes far beyond merely offering the best compensation.