

2024 WLA Ambassador Events Guide:

Conferences & Special Events for Women in Finance

Summary of Essential Conferences for Financial Advisors: To help plan and prepare for the coming year, the WLA has prepared a 2024 Conference and Event Guide specifically for our ambassador community. The guide offers a comprehensive, though not exhaustive, list of finance industry, financial planning, and women's leadership and community-building events around the country throughout 2024.

Note that the event descriptions are provided by the event host.

January

Heckerling Institute on Estate Planning

January 8-12, 2024

Orlando, FL

The Heckerling Institute on Estate Planning is the nation's premier educational conference for all members of the estate planning team, including attorneys, trust officers, accountants, charitable giving professionals, elder law specialists, wealth management professionals, and nonprofit advisors. In addition to providing the highest quality educational programming, the Institute offers unparalleled networking and professional development opportunities,

https://heckerling.law.miami.edu

Women in Retirement Conference (WiRC)

January 10-12, 2024

Isle of Palms, SC

The Women in Retirement Conference (WiRC) is the only conference of its kind, with conference content built by women for women advisors and TPAs in the industry. WiRC brings together women advisors and TPA business owners and leaders in the retirement plan service industry. The education focuses on four key areas: leadership, sales and marketing, practice management, and professional development and growth.

https://womeninretirement.org/wirc/

Women Lead Change Workshop: Cracking the Culture Code

January 11, 2024

All Access Virtual

Women Lead Change is dedicated to the development, advancement and promotion of women, their organizations, and to impacting the economy and future workforce.

In this energetic workshop, Kelly will introduce the key ingredients necessary to create a culture where employees are highly engaged, inspired, and carrying your company's mission forward through purpose.

https://www.wlcglobal.org/events

Global Financial Planning Connect

January 13-15, 2024

Miami, FL

The Connect conference is an opportunity to connect with and learn from leading international and cross-border practitioners who do financial, tax, and estate planning.

https://www.gfpconnect.com

February

Exchange 2024 - Blueprint for growth February 11–14, 2024 Miami Beach, FL	Exchange is a holistic financial services conference where advisors can strengthen their skills and develop across core dimensions of their professional portfolio. https://www.exchangeetf.com
Redeeming Money February 12-14, 2024 Orlando, FL	Redeeming Money is the annual gathering of Christian financial professionals who come together to reorient our hearts toward God and money as we encourage each other in real and meaningful ways. This unique conference inspires progress, connects people, and cultivates spiritual growth for every conference attendee. https://kingdomadvisors.com/events/conference
FPA of Central FL - Symposium 2024 February 5-6, 2024 Lake Mary, FL	For 34 years, the leading financial professionals of Central FL and beyond have gathered at Symposium to attend advanced educational sessions, learn cutting-edge business practices, and network with the best and the brightest in the profession! https://www.fpafla.com/symposium-2024/
Barron's Advisor Hall of Fame Summit February 14-16, 2024 Ojai, CA	Every two years, we recognize the recipients of the Hall of Fame Award at the Barron's Advisor Hall of Fame Summit. This three-day event is an intimate meeting of these elite advisors and their successors. The goal is to allow Hall of Fame Advisors to collaborate, share best practices, and ensure that their legacy of excellence is passed down to the next generation of advisors. https://www.barrons.com/advisor/summits/all/hall-of-fame-summit
NAPFA Large Firm Forum February 19-21, 2024 Scottsdale, AZ	Enjoy an exclusive opportunity to connect with like-minded leaders at the 2024 NAPFA Large Firm Forum! Attendees participate in a two-day program of thought-provoking presentations from prominent speakers, in-person round table discussions, and brainstorming with other industry leaders who manage distinctive challenges each day as they lead their firms into the future. https://www.napfa.org/2024-large-firm-forum
Forbes Shook - Top Teams Summit February 20-22, 2024	Forbes SHOOK Top Advisor Summit in Miami. The only industry event that sells out every year! Join us at this industry-leading event with America's Top Wealth Advisors & RIAs. CE Credits
Miami Beach, FL	https://www.shookresearch.com/2024-forbes-shook-top-teams-summit.php
The MoneyShow/ Traders EXPO February 21-23, 2024 Las Vegas, NV	The 2024 presidential election. Volatile interest rates. Growth and recession questions. Geopolitical tensions in the Middle East and the South China Sea. Investors have a LOT on their plates to contend with as 2024 gets underway. But if there is ONE constantone need that ALL investors and traders shareit's a thirst for new ideas. New opportunities. New strategies and recommendations. All are designed to help you better navigate the markets, regardless of what happens in politics, markets, and the economy. That is what investors and traders will get at our first in-person, LIVE event of the year. https://conferences.moneyshow.com/moneyshow-las-vegas/registration/
California Conference for Women February 29, 2024 Santa Clara, CA	The California Conference for Women provides connection, motivation, inspiration, and skill-building in a specially designed hybrid format. Influential experts will lead practical workshops on the issues that matter most to women, including leadership, career advancement, workplace equity and inclusion, health, work/life balance, and more. Experience unique opportunities for networking, professional development, and personal growth live on Conference day and on-

demand during Women's History Month.

https://www.caconferenceforwomen.org/conference/

March

Women's Leadership and Empowerment Conference

March 1-3, 2024

Bangkok, Thailand

We are thrilled to bring together a global community of passionate individuals who value meaningful connections, intercultural exposure, diversity of perspectives and ideas, and effective communication. Our conferences offer an unparalleled platform where inspiration, knowledge, and opportunities converge.

https://www.wleconference.org

45th Annual Institutional Investors Conference

March 3-6, 2024

Orlando, FL

Raymond James' 45th Annual Institutional Investors Conference connects institutional investors and company management teams.

https://www.raymondjames.com

Women's Private Equity Summit

March 3-6, 2024

Phoenix, AZ

Our agenda will be delivered in a range of engaging formats. They will provide you with valuable, actionable insight into market trends, investment strategies, and operational considerations that will be key to ensuring your success across different roles, seniorities, and strategy focuses.

https://events.withintelligence.com/womensprivateequitysummit/home

Investment Adviser Compliance Conference

March 6-8, 2024

Washington, DC

The Compliance Conference is a comprehensive, two-day, in-person program that provides investment advisers with the most up-to-date information available on the changing regulatory landscape. The program features a distinguished roster of speakers who are experts in their fields — including SEC officials, investment adviser industry professionals, legal experts, and the IAA legal team. In addition to meeting and interacting with peers, participants will return to their firms with practical insights and knowledge of best practices to help them maintain a successful compliance program.

https://www.investmentadviser.org/events/compliance-conference/

Orion Ascent

March 12-15, 2024

San Diego, CA

Immerse yourself in 3 days jam-packed with advisor and expert-led education, hands-on workshops, time to truly connect with peers, partners, and prospects, fantastic food and entertainment, and so much more.

https://orion.com/events

Financial Advisor Invest in Women

March 13-14, 2024

West Palm Beach, FL

FA Magazine's Invest in Women Conference is a forum to discuss those issues that are meaningful for women in financial planning as well as serving female clients. Both male and female advisors are encouraged to attend to build networks and practices.

https://faconferences.com/iiw24/

Women in Leadership Conference

March 14, 2024

Pensacola, FL

As women navigate the path of higher management positions, they are challenged to proactively manage their growth and development to prepare for the leadership roles they desire. Female students need to increase their leadership capacity and prepare themselves for success in the workplace. This conference will connect both men and women with ideas and best practices, recognized thought leaders, resources and solutions, and peers. Don't miss your opportunity to be a part of the Executive Mentor Program's biggest and best program yet. Check out the program details and register today!

https://uwf.edu/cob/community-outreach/women-in-leadership/

NATIONAL CONFERENCE FOR WOMEN

March 14, 2024

Virtual

Every year, more than 50,000 women attend one of four annual events hosted by the Conferences for Women, the largest network of women's conferences in the nation. Now, for the first time, these women and others from across the country will come together in one digital space on March 14, 2024, during Women's History Month.

https://www.conferencesforwomen.org/national-conference/

Barron's Advisor Independent Summit

March 13-15, 2024

Salt Lake City, UT

This invitation-only event offers the top independent practitioners a unique opportunity to interface and network with peers who best understand their businesses. Offered by Barron's Advisor since 2009, this curated experience has become the premier annual event for ranked independent advisors, with content designed to highlight the best practices and specific needs of independent advisors.

https://www.barrons.com/advisor/summits/all/independent

EconoMe Conference

March 15-17, 2024

Cincinnati, OH

The EconoMe Conference is the only large-scale event specifically designed for the FIRE movement (financial independence, retire early). This 3-day party about money, held in Cincinnati, Ohio, is jam-packed with presentations, workshops, breakout sessions, and many fun social activities.

https://economeconference.com

Fresh Start's Annual Gala

March 23, 2024

Scottsdale, AZ

Fresh Start's Annual Gala on March 23rd is an inspiring and fabulous evening that fuels life-changing support for women on their journeys to self-sufficiency. This magical evening will include Fresh Start's signature couture cocktail reception and fashion show this year: Neiman Marcus presents Carolina Herrera with Creative Director Wes Gordon. Along with gourmet dinner in the Phoenician Grand Ballroom, music and dancing to The Hamptons, and so much more!

https://freshstartwomen.org/events/2024-fresh-start-annual-gala/

Ellevate Women's Leadership Summit

March 25-27, 2024

Las Vegas, NV

At Ellevate Foundation, our purpose is to foster leadership. Our annual Women's Leadership Summit is our flagship event where we gather each spring to share a special experience focused on leadership, empowerment and self-care. Proceeds help us fulfill our mission of providing financial grants for women to attend professional events.

www.ellevatefoundation.org

April

IWI Experience 2024

April 7-10, 2024

Las Vegas, NV

Experience 2024 is the year's premier event for wealth advisors and luminaries from across the investment industry.

https://content.investmentsandwealth.org/experience-2024

MilMoneyCon

April 25-27, 2024

Denver, CO

MilMoneyCon is the event for financial professionals united by military service. Its mission is to bring service members, veterans, and military spouses together to build and progress their careers, continue their education, and grow their earning power as practicing or rising financial professionals.

https://milmoneycon.com

The Exit Planning Summit is like the Super Bowl for the exit planning profession. It's powered by **Exit Planning Institute** CEPAs and hosted by EPI. It allows top advisors from all over the world to come together to April 28-30, 2024 develop deep and meaningful relationships, advance their knowledge in value acceleration, and drive best practices. The Summit is intellectually stimulating, transformational and visionary, Marco Island, FL strategic growth-oriented, and fun. https://exitplanningsummit.com RJFS Elevate National Annual RJFS National Conference for Professional Development. Elevate is an opportunity to Conference spend a few days meeting our firm's senior management, fellow advisors and home office April 29- May 2, 2024 associates committed to driving your success. This one-of-a-kind event allows you to learn more about our firm, explore everything our technology can do for you, and discover how affiliating National Harbor, MD with Raymond James can level up your business. https://www.raymondjames.com May This event is by invitation only and brings together elite-tier advisory teams for three days of rich **Barron's Advisor Teams** content designed to address the complexities of interpersonal dynamics, provide insights on financial management, and share innovations in wealth management. May 6-8, 2024 https://www.barrons.com/advisor/summits/all/teams Las Vegas, NV FPA Retreat has been the essential annual experience that reignites your passion for financial **FPA Retreat** planning and helps you adapt to the evolving landscape while unearthing the disruptions May 6-9, 2024 reshaping your profession. Tucson, AZ https://retreat.financialplanningassociation.org NAPFA Spring 2024 National Attend to experience unparalleled education and an opportunity to engage with fellow advisors Conference in the NAPFA community. May 8-11, 2024 https://www.napfa.org/community/future-conferences Fort Worth, TX Women's Global Leadership **Forum**

May 8-9, 2024

Washington, DC

Hybrid

Hunger, poverty, disease, climate change, environmental destruction, economic and gender inequality, and social injustice... are just some of the complex challenges you're addressing. WILD develops the impactful leadership skills and behaviors of people across the global development, humanitarian aid industries, and others working for positive social change - so you can solve the world's challenges faster.

https://thewildnetwork.org/forum/

Wealth Management EDGE

May 13-16, 2024

Hollywood, FL

Wealth Management EDGE incorporates Inside ETFs+, WealthStack, and RIA Edge to power your firm's investment, productivity, and growth strategies.

https://informaconnect.com/edge/

ENVESTNET Elevate

May 14-15, 2024

Phoenix, AZ

Envestnet Elevate is especially valuable for those advisors who are using Envestnet to manage their wealth management process. Attend the conference to learn more about Envestnet functionality, hear from industry thought leaders, and network with advisors facing similar challenges and opportunities.

https://www.envestnet.com/event/elevate/

FINRA's Annual Conference May 14-16, 2024 Washington, DC Forbes | Shook - Top Women **Advisor Summit** May 20-22, 2024

FINRA's premier event—the Annual Conference, provides the opportunity for practitioners, peers, and regulators to exchange ideas on today's most timely compliance and regulatory topics. The conference offers various topics, including regulatory compliance, risk management, crypto asset developments, trends and threats in financial crimes, and the evolution of branch office inspections, among others.

https://www.finra.org/events-training/conferences-events/2024-finra-annual-conference

Palm Beach, FL

The event will be centered around critical conversations focused on the industry's top trends, best practices, financial strategies, investing in difficult markets and more, while connecting with inspiring women.

https://www.shookresearch.com/2023-forbes-shook-top-women-advisor-summit.php

NAIFA 2024

May 20-21, 2024

Washington, DC

The personal stories of insurance and financial professionals profoundly illustrate how public policies impact their clients. These are stories lawmakers want and need to hear. No one can tell them better than NAIFA members, and the Congressional Conference is our best vehicle for reaching a large, captive audience of policymakers.

https://conference.naifa.org/2024

June

BNY MELLON PERSHING INSITE 24

June 4-6, 2024

Nashville, TN

BNY Mellon Pershing's INSITE focuses on practice management featuring speakers from both inside and outside of the industry. Held annually in the summer, the goal of the conference is building practices. Attendees can also pick up CE credit.

https://insite.bnymellon.com/home.html

Women Lead Festival

June 13-14, 2024

Brooklyn, NY

Women Lead Festival with the world's top women leaders in business, nonprofits, public policy, science, and the arts. Collaborate with your peers on advancing allyship, redefining authentic leadership, innovating on recruitment and retention, re-entering the workforce, and recreating new inclusive workplaces.

https://www.conference-board.org/events/women

July

Annual Retirement Plan Advisor Summit

July 9-10, 2024

Chicago, IL

Over one and half days, Institutional Investor's Retirement Plan Advisor Institute will provide senior-level executives the most innovative and essential retirement plan advisor firms the opportunity to share ideas and experiences on some of the most pressing issues their clients and their businesses are facing today. The sessions will be formatted as case studies, industry-expert presentations, discussion tables, and workshops to foster collaboration and idea-sharing amongst the leaders in the ever-evolving retirement plan advisor industry. Attendees will share ideas and discuss solutions to some of the most predominant issues facing the industry today.

https://www.iinow.com/Institutional-Investor/RPA-Institute/retirement-plan-advisor-summit-central-2024

August

ICON Conference

August 7-10, 2024

Dallas, TX

This Conference is not just for anyone. It's for entrepreneurs who are passionate about their business and are ready to take their success to the next level. For over 23 years, eWomenNetwork has produced and hosted this incredible event, and this year is going to be bigger and better than ever before!

https://www.ewnicon.com

September	
Kansas City, MO	neeps,//uwse.org/2027 teadership conterence/
FPA Annual Conference September 18-20, 2024	The conference brings together financial planners, thought leaders, service providers, and allied professionals. And, as the largest annual gathering of CFP® professionals, you'll be surrounded by the very best in the business—all under one roof.
Columbus, OH	https://ac.financialplanningassociation.org
Barron's Advisor 100 Summit September 18-20, 2024 Palm Beach, FL	The Barron's Advisor 100 Summit is an annual elite gathering of the nation's preeminent financial advisors, designed to facilitate a free-flowing exchange of information, ideas and insights through peer-based communication and an unwavering focus on best practices and winning wealthmanagement strategies.
	https://www.barrons.com/advisor/summits/all/barrons-100
RJ Women's Symposium September 25-27, 2024 Tampa, FL	Attendees choose among interactive seminars, breakout sessions and inspiring presentations from Raymond James leaders and industry experts. The topics and speakers run the gamut, but the goal remains the same: to help women advisors grow their businesses. Afterward, attendees are reenergized and motivated to immediately put new ideas gained from the conference and study groups to work in their practices. The symposium offers fresh perspectives, continuing education and so much more. It's a chance for us to celebrate what we do and find new ways to honor our clients, our community and our lives.
	https://www.raymondjames.com/advisor-opportunities/diversity-and-networks/women-financial-advisors-network/womens-symposium
	October
Women's Leadership Conference October 1-3, 2024 Green Bay, WI	The Women's Leadership Conference was created by Vicki Updike, founder of New Sage Strategies LLC, a company dedicated to developing effective leaders. The conference is an all-day professional development and networking conference created to provide a platform outside of the workplace to educate, encourage, and inspire women to take their careers to the next level. Our purpose is to empower our attendees by creating a community dedicated to helping each other build and enhance amazing careers.
	<u>https://womensleadershipwi.com</u>
Forbes Shook Top Advisor Summit	Forbes SHOOK Top Advisor Summit in Las Vegas. The only industry event that sells out every year! Join us at this industry-leading event with America's Top Wealth Advisors & RIAs. CE

October 14-17, 2024

Las Vegas, NV

Credits.

https://www.shookresearch.com/events/

AFWA's Women Who Count Conference will bring together hundreds of accounting and finance professionals from across the country. The event offers education to keep attendees competitive, **Women Who Count** professional development courses to empower their potential, leadership training to grow and manage their chapters, and connection opportunities to build powerful business networks. Our October 22-26, 2024 members are apart of the big firms that can potentially lead to better opportunities for all! Hilton Head, SC

https://www.afwa.org/women-who-count/

NAPFA Conference

October 30 - November 2, 2024

Nashville, TN

Broad-based education on a variety of planning topics. The latest information in industry and regulatory trends and issues. Greater insight into NAPFA and its advocacy for consumer protection and fiduciary standards.

https://www.napfa.org/community/future-conferences

November

Women in Leadership Institute

November 11-14, 2024

Orlando, FL & Virtual

The Women in Leadership Institute™ (WIL) is a four-day learning conference that equips women leaders with actionable strategies to overcome the hurdles women often face in the workplace. This isn't your typical women's conference. This immersive leadership development experience drives results and accelerates the advancement of women.

https://www.linkageinc.com/event/women-in-leadership-2024/

December

Barron's Advisor Women
Summit

December 4-6, 2024

Palm Beach, FL

Barron's Advisor Women Summit brings together the best minds in the wealth-management industry. It is designed to facilitate a free-flowing exchange of information, ideas and insights from the industry's most accomplished women advisors—in the interest of raising the standards of excellence in the wealth management profession.

https://www.barrons.com/advisor/summits/all/women