

**APRIL 4-6 2022 ADISA Spring Conference**  
**The Rosen Shingle Creek, Orlando**



**ADISA 2022 Spring Conference**  
**AGENDA-AT-A-GLANCE**

**Monday, April 4**

*12:00-1:30 pm*

Women's & Next Generation Reception & Luncheon

*1:45-2:50 pm*

- (1) Fundamentals of Alternative Investments (Alts 101)
- (2) Which Tax-Advantaged Strategy is Right for Your Client?
- (3) The Digital Transformation of Alternative Investments: Are You Ready

*3:00-4:00 pm*

- (4) Recruiting and Championing the Next Generation
- (5) Energy Transition: Not a Zero-Sum Game
- (6) Custodian Expectations by RIAs for Alternative Assets

*4:30-5:00 pm*

Conference Kick-Off

*5:00-6:00 pm*

General Session I: Industry Update

*6:00-7:00 pm*

Opening Cocktail Reception & Exhibition

**Tuesday, April 5**

*8:00-9:00 am*

Breakfast, Exhibition & Committee Meetings

*9:00-9:50 am*

General Session II: Legislative & Regulatory Updates

*9:55-10:45 am*

General Session III: New Economics of Social Change

*10:50-11:40 am*

- (7) Preferred Stock: The True Liquid Alternative
- (8) The Importance of Monitoring Performance: Warning Signs!
- (9) The Evolution of the DST Market with the Proliferation of 721s

*11:50 am-12:40 pm*

- (10) Inside a FINRA Arbitration (Live)
- (11) The Question of Leadership & Culture of Finance in Today's Environment
- (12) New Products in the Pipeline

*12:40-2:00 pm*

Lunch, Exhibition & Committee Meetings

*2:00-2:50 pm*

- (13) Working with Clients Who Want Cryptocurrency Exposure
- (14) The Latest in Advertising and Common Foot Faults
- (15) National Look at Multifamily and SFR Markets

*3:00-3:50 pm*

- (16) Alts Due Diligence and Portfolio Construction for RIAs
- (17) "Striking the Deal"
- (18) Interval Funds and the Retail Investor

*3:50-4:20 pm*

Break & Exhibition

*4:20-5:10 pm*

- (19) RIA Council
- (20) Sponsor Roundtable
- (21) Broker-Dealer Advisory Council

*5:15-6:10 pm*

General Session IV: Likely Investment Fallout from Current Crisis in Eastern Europe

*6:15-7:15 pm*

Cocktail Reception & Exhibition

## **Wednesday, April 6**

*7:30-9:00 am*

Breakfast, Exhibition & Committee Meetings

*9:00-10:00 am*

General Session V: Latest Research: Real Estate and the Internet

*10:10-11:00 am*

(22) Insurance Challenges for IBDs/RIAs

(23) Multi-Alternative Assets Managers: Many Unique Strategies for the Demanding Advisor and Investor

*11:10 am-12:00 pm*

(24) Finding and Underwriting Quality in a Hot DST Market

(25) Best Practices for Alternatives (Alts 201)