

2018 Wealth & Real Estate Conference Program Overview: May 7 - 9, 2018

Monday, May 7	Tuesday, May 8	Wednesday, May 9
Corporate Board of Governors	Wealth & Real Estate Conference	Latina Wealth Building Series
Meeting	8:30AM – 5:00PM	8:00AM – 11:30PM
8:00AM – 5:00PM		
	Please see W&RE Conference	The Latina Wealth Building Series
Welcome Reception	Agenda below	focuses on entrepreneurial
5:00PM – 7:00PM		advancement, business
	Closing Reception	development and economic
Corporate Board of Governors	5:00PM – 6:00PM	empowerment of Latina business
<u>Dinner</u>		leaders in the industry. Learn best
7:00PM – 9:00PM		practices to scale your business and
		stay competitive in an ever evolving
		market.

Wealth & Real Estate Conference Agenda

8:00AM – 8:30AM	Coffee and Light Refreshments
8:30AM – 9:30AM	Welcome Comments & Opening Keynote Session The Hispanic Wealth Project Chairman, Jerry Ascencio, and Wells Fargo SVP Head of Retail & Diverse Segments, Cerita Battles, will deliver opening remarks and frame the day's sessions and activities. The session will feature a keynote address.
9:30AM – 10:30AM	2018 Hispanic Wealth Project Annual Report While Latinos in U.S. have experience advancement in the form income gains, educational attainment, and personal financial management, disparities in household wealth generation has persisted. NAHREP Executive Director, Marisa Calderon, is joined by a panel of data savvy executives to analyze the progress and impacts of the Hispanic Wealth Project's ambitious objective to triple Hispanic household wealth over by 2024.
10:30AM – 10:45AM	Break
10:45AM – 11:45AM	NAHREP 10 Certified Trainer In collaboration with the Hispanic Wealth Project, NAHREP has launched a certified trainer program to advance the dissemination and adoption of the NAHREP 10 Wealth Disciplines. HWP and NAHREP leaders will unveil the process, metrics and ultimately the impact of this initiative. The session will include a preview of the NAHREP 10 presentation tool box.
12:00PM – 1:30PM	Hosted Luncheon Country Club Terrace



1:30PM – 2:45PM				
	Fundamentals of	The Future of Real Estate	Millionaire Mindset	
	Investment Principles	Technological	Reaching millionaire status	
	Understanding savings and	advancements and shifting	has considerably more to	
	investment principles is a	consumer preferences are	do with your mind than	
	critical step to bridging the	changing the housing	your wallet. Highly	
	wealth divide for Latinos in	industry in exponential	successful entrepreneurs	
	the U.S. This interactive	ways. NAHREP 2017	and corporate executives	
	workshop is designed to	President Leo Pareja will	will share their perspective	
	provide both first-time	discuss who will be the	on what defines the	
	investors and seasoned	winners and who will be he	millionaire mindset, outline	
	players strong foundational	losers due to these	potential barriers to	
	knowledge on investment	changes and how real estate professionals need	reaching this financial milestone and provide	
	terminology, portfolio strategies and asset	to prepare.	adoptable strategies to get	
	allocation models.	to prepare.	your mentality back on	
	anocation models.		track.	
			er deliti	
2:45PM – 3:00PM	Break			
3:00PM – 4:15PM	Concurrent Workshops			
	Unpacking Investment	Wealth Building in a	Team Building and	
	_	_		
	Vehicles	Digital Age	Revenue Scaling	
	Vehicles From retirement accounts,	Digital Age Technology advancements	Revenue Scaling Real estate has always	
	Vehicles From retirement accounts, to life insurance, and	Digital Age Technology advancements and demographic shifts have	Revenue Scaling Real estate has always been a cyclical industry,	
	Vehicles From retirement accounts, to life insurance, and college savings plans,	Digital Age Technology advancements	Revenue Scaling Real estate has always been a cyclical industry, with profit margins	
	Vehicles From retirement accounts, to life insurance, and college savings plans, understanding what assets	Digital Age Technology advancements and demographic shifts have impacted the way we approach financial services in a material way. The next	Revenue Scaling Real estate has always been a cyclical industry, with profit margins disproportionately	
	Vehicles From retirement accounts, to life insurance, and college savings plans, understanding what assets are best for your family	Digital Age Technology advancements and demographic shifts have impacted the way we approach financial services in a material way. The next generation of home buyers	Revenue Scaling Real estate has always been a cyclical industry, with profit margins disproportionately dependent on economic	
	Vehicles From retirement accounts, to life insurance, and college savings plans, understanding what assets are best for your family and your clients is complex	Digital Age Technology advancements and demographic shifts have impacted the way we approach financial services in a material way. The next generation of home buyers are more digitally connected	Revenue Scaling Real estate has always been a cyclical industry, with profit margins disproportionately dependent on economic cycles over business	
	Vehicles From retirement accounts, to life insurance, and college savings plans, understanding what assets are best for your family and your clients is complex enough. Learn the benefit	Digital Age Technology advancements and demographic shifts have impacted the way we approach financial services in a material way. The next generation of home buyers are more digitally connected and social media savvy than	Revenue Scaling Real estate has always been a cyclical industry, with profit margins disproportionately dependent on economic cycles over business practice. Learn best	
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