Session One

Converting to Redtail
Redtail Technology
Join Redtail’s trainer as she will give administrators best practices on working with multiple advisors within Redtail. She will cover the following:

- Managing Database Lists/Tag Groups
- Permissions/Teams
- Mail Merges
- Workflows

Uncover the Best Kept Secrets of NetX360 and NetXInvestor
Pershing Team
Are you efficient with NetX360 and looking to get to the next level? In this session, join Pershing as they show you some of the more advanced features and new functionalities available on the platform? Items like resetting a client password, emulating a client on NetXInvestor, processing asset movement, and running reports will all be covered. They'll share proven practices and demonstrate how you can use their tool to engage the client in a deeper relationship.

Marketing with Broadridge
Kevin Scheck, Lincoln Investment & John Bracco, Broadridge
In today’s fast-paced digital world, it can be difficult to find time to address your marketing needs. Fortunately, Broadridge provides the resources to make it easier. Learn all that Broadridge has to offer and best practices for how advisors are successfully using these tools. Build your business through marketplace visibility and client acquisition solutions. Optimize your practice with targeted content campaigns through email and social media to make your day-to-day life easier.
Session Two

Proven Office Techniques
*Michele Gravlin, Molly Hanavan & Angela Stachowski - Administrator Panel*
An open forum panel of peers sharing proven techniques and efficiencies. Bring questions and build relationships with other Administrative Assistants while learning tricks of the trade from each other. Our talented and tenured panelists are Michele Gravlin, a Senior Branch Administrator at the South Jersey Branch Office for 24 years, Angela Stachowski, the Securities Operations/Compliance Manager at the WMP-Main Branch Office for 7 years, and Molly Hanavan the Office Manager at the Getzville Branch Office for 38 years.

Save Time & Money with Quick Service Tools – Web Transactions and Mobile Deposit
*Service Team, Lincoln Investment*
Join the Operations and Service Team and skip the time in the call queue by learning about the world of web transactions. Learn how to do exchanges, distributions, web payroll changes and even systematic changes and updates. We’ll walk you through each transaction type and show you how quick and easy it’s done from LIONs. Also save time and overnight fees by learning how to use mobile deposit. Walk through the mobile deposit process with us and sign up on the spot to become a user of this great new tool!

Account Central Optimization
*Kate Shingledecker, Lincoln Investment*
This session is designed to provide a practical application of using Account Central in your day-to-day work life. Learn how to use many of the tools available so that you can work smarter NOT harder. Additionally, this session will cover helpful troubleshooting and housekeeping tools. Bring your questions or struggles and we will help you uncover the best solutions to help. Items to be covered: creating a bundle without a client, adding forms to a work item that are not in the forms library, home office to mail direct paperwork, best practices for uploading completed forms vs. using barcodes, submitting work items with mobile deposit/mailing check process and saving favorite forms and creating labels in the forms library, how to read MLA 2.0 and NIGOs and the best way to respond to NIGOs.