

**Barron's Top Advisor Summit  
Blockchain & Cryptoasset Pre-Conference  
March 16 - 17, 2019 – Salt Lake City, UT**

**March 16, 2019**

**8:30pm – 9:00pm  
Rediscovering Crypto**

In this keynote talk, Lex Sokolin gets to the heart of what's driving the crypto ecosystem today, and why the world needs it to succeed more than ever. Discussion topics include macro developments and the financial health of projects, the main vectors of innovation in 2019, and a vision for how crypto firms can engage and persuade wealth managers to cross the chasm. With examples of some of the best emerging developments -- and some of the worst ones as well -- this talk will anchor practitioners, investors and planners in how to think about the tokenized future.

Lex Sokolin, CMO & Global Fintech Co-Head  
Autonomous Research

**March 17, 2019**

**7:00am – 8:00am  
Registration and Continental Breakfast**

**8:00am – 8:25am  
Crypto Exposure: Strategic Allocation for Institutional Investors**

There has been increasing interest from institutional capital as it relates to crypto. Some of the most well-known and forward-thinking endowments and pensions have already started to deploy capital into the space. However, making the decision to invest in crypto is just the initial step in the process. It's critical to understand where crypto fits within a broader portfolio, the different ways to get exposure, and how to think about allocation strategically.

Matthew Shapiro, Principal  
Multicoin Capital Management

**8:25am – 8:40am  
Building the Future of Security and Trust in Digital Assets**

In this session, BitGo will review the current capital market infrastructure for digital assets, discuss some of the major impediments to institutional investors and share how BitGo's

offerings provide the required security, compliance and controls the digital asset market needs for expansion.

Rodrigo Vicuna, Director of Operations  
BitGo

**8:40am – 8:55am**

**Live Demo of Digital Assets Data Analytics Platform for Institutional Cryptoasset Investors**

Digital Assets Data President Ryan Alfred will demonstrate how institutional cryptoasset investors are using market, blockchain and reference data to build sophisticated trading models and perform custom research on our hosted crypto data and analytics platform.

Ryan Alfred, President  
Digital Assets Data

**8:55am – 9:10am**

**Analytics on the Trading Desk**

Karl will describe the use cases for FRST's software, its current core customer, and how asset managers utilize FRST's software when starting a trading desk or when analyzing the performance of current operations.

Karl Muth, CEO  
FRST

**9:10am – 9:20am**

**Morning Break**

**9:20am – 10:05am**

**Crypto and Taxes**

Pat will discuss the current and possible future of cryptocurrency regulation and taxation as well as some tax advantaged investment strategies.

Pat Larsen, CEO & Co-Founder  
Zen Ledger

**Gemini: Your Bridge to the Future of Money**

Kristen will provide the current status of Gemini and their outlook on SEC and the future of crypto.

Kristen Mirabella, Principal, Sales & Relationship Management  
Gemini

## **The Life of a “Token” in Regulatory Terms**

In this presentation, Andrew Cross will explore the “chameleon like” regulatory characteristics of digital assets, and potential implications for stakeholders involved in the ecosystem – sellers and purchasers, listing exchanges, secondary purchasers, investment advisers, broker-dealers, and custodial service providers.

Andrew Cross, Partner  
Perkins Coie

**10:05am – 10:25am**

### **Exploration of the Blockchain/Crypto Infrastructure**

Understanding blockchain technology, areas to disrupt, and capturing value in the growing ecosystem.

Dan Morehead, CEO  
Pantera Capital

**10:25am – 10:45am**

### **Blockchain and Cryptocurrency: Perspectives from Institutional Investors and the Impact on Financial Services**

This session will explore institutional perspectives on digital assets and enterprise distributed ledger technology, and how they will transform the financial services industry.

Nathaniel Rand, Managing Director, Blockchain  
State Street

**10:45am – 11:05am**

### **Institutional Interest in Digital Assets**

Terrence Dempsey, VP and head of product at Fidelity Digital Assets, will share Fidelity’s latest insights on the firm’s interest in crypto assets and blockchain technology. Terrence will discuss the various investment theses Fidelity is hearing from investors, and the factors needed for institutional adoption.

Terrence Dempsey, Vice President of Product  
Fidelity Digital Assets

**11:05am – 12:00pm**

### **Making Assets Fungible: The Future of Asset Tokenization**

For centuries, the vast majority of assets have been highly illiquid, either because of their physical nature (e.g. real estate, precious metals) or because of their legal or regulatory structures (e.g. securitized loans, private equity). The arrival of the blockchain and its capabilities is posed to change that. Join us in a discussion of the implications of a world where every asset can have a digital equivalent that can be easily stored, traded, and leveraged.

Matt Jennings, Co-Founder & CEO,  
Kingdom Trust

**12:00pm – 1:25pm**

**Lunch**

**1:25pm – 1:45pm**

**Investing in Blockchain Funds**

This session will cover tapping into the emerging global asset class of the blockchain and cryptocurrency ecosystem.

Eric Ervin, President & CEO  
Blockforce Capital

**1:45pm – 2:05pm**

**Crypto Portfolio Tracking & Blockchain Tech Integrations**

Orion discusses the wins and challenges advisors face in tracking this new asset class and the future of integrations and impacts on advisors.

Eddie Sempek, Chief Innovation Officer  
Orion Advisor Services

**2:05pm – 2:35pm**

**Afternoon Networking Break**

**2:35pm – 2:55pm**

**Advisors, Crypto and the Outlook for ETFs**

Nearly 80% of financial advisors says clients are asking them questions about crypto. Nearly 20% plan to allocate to crypto in 2019. But how? In this presentation, Bitwise will examine the outlook for crypto ETFs, and discuss how leading advisors are investing today through private vehicles.

Hunter Horsley, CEO & Co-Founder  
Bitwise Asset Management

**2:55pm – 3:15pm**

**Is Blockchain/Crypto a Game-Changing Revolution, or a Bunch of Tulip Bulbs?**

The investment community has monitored the rapid rise and decline of digital assets over the past few years. Is it a tulip bulb bubble or a revolution? Gabor Gurbacs, Director of Digital Asset Strategies at VanEck, will discuss the revolution that Bitcoin, digital assets, and blockchains may hold for the future. He will also provide some “gardening tips” on how to avoid tulips.

Gabor Gurbacs, Director – Digital Assets Strategy  
VanEck

**3:15pm – 3:35pm**

**Beyond Bitcoin: Portfolio Diversification in the Digital Age**

It’s not every day, or even every decade, that an entirely new asset class is born. It’s time to gain a deeper understanding of how digital assets are creating new investment opportunities and helping investors build portfolios with higher risk-adjusted returns. Join Michael Sonnenshein, Managing Director of Grayscale, the largest digital currency asset manager, as he discusses digital assets – from

Bitcoin to Horizon Zen – and how they should be considered a component of the optimal beta portfolio, alongside traditional assets such as equities, bonds, and real estate.

Michael Sonnenshein, Managing Director  
Grayscale Investments

**3:35pm – 3:55pm**

**Crypto: Is It an Alternative Asset Class?**

Many advisors have taken a position on crypto – for or against – but most have it wrong. In this enlightening, and surprising, session, Ric Edelman, 3 times ranked the #1 Independent Financial Advisor by Barron's, will show you a completely different way to view crypto. This compelling presentation is sure to change your perspective.

Ric Edelman, Founder  
Edelman Financial Engines