

Inside ETFs
Digital Assets Explained
January 26, 2020 – Hollywood, FL

2:00pm – 2:30pm

Introduction to Blockchain and Digital Assets -- Just another Tulip Bulb? Or Global Transformation?

Is Bitcoin just another pump-and-dump scheme? Or will this revolutionary technology transform commerce on a planetary scale? As a financial advisor, you must become knowledgeable about the blockchain, as well as bitcoin and other digital assets, so you can decide whether your clients should invest – or stay away.

Everyone knows about bitcoin's massive volatility. But few can explain the blockchain, bitcoin's underlying technology. This vital session will remove the mystery about these innovative technologies, enabling you to have meaningful conversations with your clients about blockchain and digital assets – while also helping you learn the implications for your own advisory practice.

Ric Edelman, Founder
RIA Digital Assets Council

2:30pm – 3:00pm

Bitcoin in 2020: New Data On How And Why Financial Advisors Are Incorporating Crypto InTo Client Portfolios

In this stand-alone session, Inside ETFs Chairman and Bitwise Global Head of Research Matt Hougan will reveal new data from a survey of more than 400 financial advisors revealing both how, why and where advisors are incorporating crypto into client portfolios. Hougan will also examine the key developments in the crypto market in 2019 that are driving increased adoption by advisors, and what to look for in the year ahead.

Matt Hougan, Global Head of Research
Bitwise Asset Management

3:00pm – 3:35pm

Tax and Regulatory Issues

The SEC says bitcoin is not a security, and the Federal Reserve says bitcoin is not currency. The IRS says bitcoin is property subject to taxation, but the CFTC says bitcoin is a commodity. What's a taxpayer to do? Currently, there's little federal regulation over bitcoin – allowing a

Wild West environment to flourish. Five companies have asked the SEC for permission to launch a bitcoin ETF. Will the agency approve the applications? This session examines the crucial tax and regulatory status, to help you manage your practice and provide guidance to your clients.

Session Leader:

Ric Edelman, Founder
RIA Digital Assets Council

Panelists:

Brett Cotler, Tax Attorney
Seward & Kissel LLP

Craig Salm, Director, Legal
Grayscale Investments

Joel Telpner, Partner
Sullivan & Worcester LLP

3:35pm – 4:00pm
Networking Break

4:00pm – 4:35pm
Investing Opportunities in Blockchain and Digital Assets

With virtually any computer, you can mine bitcoin on your own, like picking apples from a tree. Or you can buy bitcoins from an online exchange, like buying stocks at a brokerage firm. You can also invest in funds that buy digital assets or acquire a stake in companies that are building blockchain technology. This session will show you the wide variety of investment opportunities available for you and your clients – and how to incorporate these strategies into your practice.

Session Leader:

Dave Abner, President
Dabner Capital Partners

Panelists:

Jake Ryan, Founder & CIO
Tradecraft Capital

Michael Sonnenshein, Managing Director
Grayscale Investments

4:35pm – 5:10pm
Digital Assets: Is it an Alternative Asset Class? -- Portfolio Diversification in the Digital Age

If you want to recommend digital assets to your clients, how would you go about it? Which digital assets would you recommend, and to what degree? In this session, you'll discover the options available to you, and how you can increase your client's portfolio diversification.

In an asset allocation model, should bitcoin be listed as equity, as debt – or as a completely new asset class? This remarkable session will tie together everything you've learned in today's program and show you the two startling reasons why you should place digital assets into your clients' portfolios.

Paul Cappelli, Portfolio Manager
Galaxy Digital LP

6:00pm – 7:30pm
Cocktail Reception