

T3 Advisor Conference
Digital Assets Explained
February 17, 2020 – San Diego, CA

8:00am – 9:00am

Registration and Continental Breakfast

9:00am – 9:50am

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.

Matt Hougan, Global Head of Research
Bitwise Asset Management

9:50am – 10:40am

Crypto Mega Theses

Some financial advisors remain reluctant regarding the legitimacy and sustainability of digital assets. In this session, Kyle Samani, Co-Founder and Managing Partner of Multicoon Capital, will explain why digital assets will play an important role in the investment landscape as he presents the three mega theses (open finance, web3 and global, state-free money) that he believes represent multi trillion dollar investable opportunities over the next decade. With the common theme underlying these theses focused on reducing trust between transacting parties, Kyle will also walk you through why creating a world with fewer trust assumptions can reduce systemic risk and create ultimately healthier and more productive economies and societies.

Kyle Samani, Co-Founder and Managing Partner
Multicoon Capital

10:40am – 11:00am

Morning Break

11:00am – 11:50am

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.

Walter Pagano, Tax Partner
EisnerAmper LLP

Joel Telpner, Partner
Sullivan & Worcester LLP

11:50am – 12:40pm

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.

Ric Edelman, Founder
RIA Digital Assets Council