

TD LINC
Digital Assets Explained
January 29, 2020 – Orlando, FL

8:00am – 8:45am

Registration and Continental Breakfast

8:45am - 9:45am

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 can help 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 potential implications for your own advisory practice.

Ric Edelman, Founder
RIA Digital Assets Council

Sunayna Tuteja, Head of Digital Assets
TD Ameritrade

9:45am - 10:00am

Morning Break

10:00am – 10:40am

How big is blockchain and digital assets?

Currently, various college endowments are investing in bitcoin and other digital assets and banks worldwide have collectively invested billions of dollars in blockchain technology. This

section will discuss what some major institutions are doing, and what this could mean for your advisory practice.

Mark Yusko, CEO & CIO

Morgan Creek Capital Management

10:40am – 11:20am

Tokenization: The future of investing

For centuries, investors have been able to buy tiny pieces of huge companies. Why stop there? Today, you can buy small slices of apartment buildings in Manhattan, rare wines, Old Masters, even exotic sports cars. Using the blockchain, investors can now buy a token (akin to a stock's share) of just about anything. Tokenization could revolutionize asset ownership on a global scale – and this session will show you both how tokenization works and the potential implications for investment management and asset allocation.

Dara Albright, Advisor

EisnerAmper

Gabor Gurbacs, Director, Digital Asset Strategy

VanEck/MVIS

11:20am – 12:00pm

Investing opportunities in blockchain and digital assets

With virtually any computer, you can mine bitcoin on your own, or you can buy bitcoins from an online exchange, similar to buying stocks through 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 section will show you the wide variety of investment opportunities available for you and your clients – and how to potentially incorporate these strategies into your practice.

Dave Abner, President

Dabner Capital Partners

Jake Ryan, Founder & CIO

Tradecraft Capital

12:00pm – 1:00pm

Lunch for Delegates

1:00pm – 1:45pm

Portfolio tracking and blockchain tech integrations

Buying digital assets is one thing; tracking prices across different market-making platforms is quite another. Several companies have emerged to help address a key challenge facing investors and investment advisors, and this session will give you an inside look at what they offer.

Tim Rice, Co-Founder & CEO

Coin Metrics

1:45pm – 2:30pm

Keynote fireside chat with Michael Novogratz

Mike's rise to fame came as a hedge fund manager at Fortress Investment Group. A longstanding advocate of cryptocurrency, he started buying Bitcoin before his retirement from Fortress and becoming the CEO of Galaxy Digital LP. In this upfront and candid fireside chat, Mike will answer questions about digital assets from Ric Edelman, 3 times ranked the #1 independent Financial Advisor in the nation by Barron's.

Michael Novogratz, Founder, CEO and Chairman

Galaxy Digital

2:30pm – 3:10pm

Digital assets: Is it an alternative asset class?

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

Ric Edelman, Founder

RIA Digital Assets Council

3:10pm - 3:40pm

Afternoon Break

3:40pm – 4:20pm

Tax and regulatory

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

Craig Salm, Director, Legal

Grayscale Investments

Joel Telpner, Partner

Sullivan & Worcester LLP

4:20pm – 5:00pm

Beyond bitcoin: 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 section, you'll discover the

options available to you, and how you can potentially increase your client's portfolio diversification.

Matt Hougan, Global Head of Research

Bitwise Asset Management

Michael Sonnenshein, Managing Director

Grayscale Investments

5:00pm - 6:30pm

Cocktail Reception