
Agenda

**SOUTHERN CALIFORNIA
NOVEMBER 7-8, 2024**

**ALLIANCE ADVISORY
31248 E OAK CREST DR.,
SUITE 100 WESTLAKE
VILLAGE, CA 91361**

THURSDAY

12:45-1:15PM

Introductions

1:15-2:30PM

Lesson 1:

“The World’s Story for Investing: The Problem”

Learn to discern the story of the world. How did we get here? What are the dangers of investing just like the world?

2:30-2:35PM

Break

2:35-4:05PM

Lesson 2:

“God’s Story for Investing: Good Products”

We look to the creation account in Genesis to understand God’s story for work and its implications for business and investing. What does the Bible say about products?

4:05-4:10PM

Break

4:10-5:00PM

Lesson 3:

“God’s Story for Investing: Good Practices”

We look back at the creation account to understand the social nature of work in God’s design. How should this lead us to think about the practices of a business?

5:30 - 7:30PM

Dinner

FRIDAY

8:00-8:30AM

Breakfast

8:30-9:45AM

Lesson 4:

“God’s Story for Investing: Good Profits”

Understand the gift of wealth creation and its proper place within God’s world. Are all profits good? Can profits become an idol?

9:45-9:50AM

Break

9:50-11:05AM

Lesson 5:

“Living Out God’s Story: Putting It into Practice”

Learn how to live out God’s story in your wealth management practice. What are the most important steps to getting started? What resources and tools are available?

11:05-11:10AM

Break

11:10-12:00PM

Lesson 6:

“Living Out God’s Story: Sharing with Clients”

Do we always have to use Christian language? Learn how to explain God’s story for investing to your clients in language that they will understand and find attractive.

12:00-12:30PM

Lunch

12:30-1:00PM

Commissioning Lesson

Continuing
Education Credits

Participants will be eligible for 3 hours of CKA continuing education credits and 7 hours of CFP, CIMA, CPWA, and RMA continuing education credits.



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