



Speaker Bios Monday



Alan Mallary, MA, BSc, PEng, PE, PMP is an international speaker, author and performance coach who is passionate about leadership and reaching new heights in all that we do! His unique philosophy of life revolves around empowering people and embracing an agile mentality focused on goals and results. By understanding what drives and motivates us, we are able to cultivate more innovative and effective ways of thinking and taking action.

Alan holds a degree in Engineering from Queen's University and a Masters in Psychology from Adler University, giving him a well-balanced approach to the outer and inner challenges we all face. Living and working abroad has given him the opportunity to deepen his understanding of individual and team challenges, better appreciate cultural diversity and successfully adapt to different organizational structures.

Building experience through a lifestyle of adventure and challenge, in the spring of 2008 Alan embarked on the journey of a lifetime and set a world record on Mount Everest along with three members of his immediate family. It was a two-month expedition through some of the most exciting yet terrifying conditions imaginable and their success demanded an unwavering perseverance and resilience in the face of adversity. Alan delivers a number of exciting presentations and training programs designed to help individuals, team members and organizations reach new heights in the way we think and the actions we take in order to achieve breakthrough performance.



Harlan Accola has been in the mortgage industry for over 20 years and has worked with all types of loans. His specialty and favorite has always been working amongst the 62 plus age group with over 1,000 Reverse Mortgages which has been the most rewarding part of his career. He is now the Reverse Mortgage Director for Fairway Independent Mortgage Corporation. His presentations will give you a very different perspective. He often asked his clients and professional partners, "If what you thought you knew about mortgages and financial planning was wrong, when would you want us to tell you?"

The goal of Harlan and Fairway is to change the way retirement is done for baby boomers in this country. There is a perfect storm and a retirement crisis that can be avoided if we properly manage the trillions of dollars in home equity.



John Nersesian, CFP®, CIMA, CPWA, CIS is Head of Advisor Education at PIMCO, providing advanced wealth management and investment consulting education to financial professionals. John previously served as senior managing director of Wealth Management Services for Nuveen Investments from 2000 to 2018. He also served as first vice president at Merrill Lynch Private Client Group, where he was also a leader of advanced training for financial consultants.

Mr. Nersesian has 35 years of investment and financial service experience and is an industry thought leader and frequent media contributor. He served as a board member of the Investments and Wealth Institute (IWI, formerly IMCA) from 2006-2017, and as chairman for the 2014-2015 term, and is a faculty member for the IWI Certified Private Wealth Advisor (CPWA) and Certified Investment Management Analyst (CIMA) education programs held at Yale University and The University of Chicago. John holds a BS in Business and Economics from Lehigh University.



Cozy Wittman is an Education and Partnership manager at College Inside Track, and speaks nationally about college search, educating families and training financial advisors and other professionals who work with families with high schoolers. College search has become increasingly complex, the nuances hard to understand; Cozy is passionate about dispelling myths that cost families money!

Cozy is excited to connect with organizations and families interested in learning more about the complex college search process. She is a mom of 5 kids with very different goals for college so she is no stranger to the challenges around college search.



Joe Santiago is an independent insurance agent specializing in Medicare plans. He began his career in 1993 as a captive agent for Bankers Life and Casualty, then started his own agency in 1999. Since then he has helped thousands of clients secure their Medicare Insurance coverage. He takes a needs based approach and finds the ideal plan for each individual. He also conducts annual reviews to make sure each client always has the proper coverage.

Joe works very closely with many professionals including Financial Planners, Insurance Agents, Elder Law Planning Attorneys, Guardians, Doctor Offices and Human Resource Managers. As an educator he provides Continuing Education courses for several professions, and is often consulted for his expertise on Medicare. Joe's office is located at the One Senior Place resource center in Altamonte Springs.



Travis Conlan joined Hines in 2013 after a 12 year professional basketball career in Europe. Prior to that Travis attended the University of Michigan from 1994-98 where he graduated with a BA in Communications and a minor in Business. In 2013 Travis was the Regional director for Hines in the Midwest working with clients in Michigan, Indiana, Kentucky and Ohio. In 2016 Travis relocated to Tampa, FL where he currently lives and is the Regional Director for Florida and Puerto Rico. Having spent 12 years in 5 different countries in Europe has given Travis great insight and knowledge of the European landscape. In His free time Travis is active in all kinds of sport, outdoor activities and spending time with his wife Katharina and two children Jonas (16) and Lani (13). Travis also speaks 3 languages and is an avid guitar player.

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Tuesday



Mari Adam CFP®, MBA, CRPC is a Client Advisor and Branch Manager, Mercer Advisors and has been a Certified Financial Planner™ professional since 1991.

After college, she served as a US Foreign Service officer with the Department of State both overseas and in Washington, D.C. before going back to school to complete an MBA in International Finance. She switched careers in her early thirties, after earning the CFP® credential, and worked at several wealth management firms specializing in financial planning and portfolio management.

Mari founded and ran her own comprehensive wealth management firm in Boca Raton, Florida, for 25 years, and recently sold it to become part of Mercer Advisors, a leading national investment advisor with 50 offices across the US and over \$27 billion under management.

She has been singled out to receive the Women's Choice Award® for Financial Advisors and Firms for five consecutive years, and specializes in helping women and other clients become financially independent. She is past President of the FPA South Florida Chapter.

She has two grown children and lives in Boca Raton FL.



Amy Moline is the Founder and CEO of KeyBella Homes Group with Exp Realty. She and her team are ranked in the top 1% of the real estate industry and have a thorough understanding of helping others sell and buy real estate.

While most agents in the industry average selling 5 homes per year, Amy and her team have sold over 1700 homes since 2005. KeyBella's focus has always been to exceed expectations for their clients.

Your clients deserve professionalism, honesty, and care. They deserve to understand the market and know what to expect when buying or selling real estate.



Don Holt has over 20 years of experience working with Registered Investment Advisors (RIA), Don currently works with advisors all across the United States but has a concentrated interest within the Southeast.

Don has spent the last 20 years working with financial service professionals helping them with all aspects of their business including trading, custody and operations, technology, business development and investment management. Don began his career at Charles Schwab and has spent the last 20 years helping financial service firms become more efficient and get back to the basics of helping deliver value to their clients.

Don is currently registered with FINRA as a registered representative of the firm, holding his Series 7 and 63 licenses and has been a featured speaker on topics ranging from practice to investment management.



Stephen McLeod has over 20 years of experience working with Registered Investment Advisors (RIA), and directs all of the activities related to advisors seeking to simplify, amplify, and solidify their businesses through Vimvest's financial technology offering. Throughout his career, Stephen has consistently been a part of developing business strategies and executing plans for the evolution and growth of advisory firms. Stephen's experience in the financial services industry and success in business is a result of his consultative relationship management manner, authenticity, and reliability. His acute and innate ability to build a partnership and friendship with clients attributes to his success. He has worked with advisory firms of all sizes to tailor complex business activities and deliver a comprehensive infrastructure that fuels an advisory firm's evolutionary growth in today's marketplace.

Prior to joining Vimvest, Stephen worked closely with the police and fire pension funds in the state of Illinois for several years and spent over two decades with Charles Schwab Advisor Services working with institutional financial advisory firms. He is registered with FINRA as a registered representative of the firm. As a result of his experience, Stephen has been trusted to work with advisors across the country to solve and propel the growth of their firms.



Paul Peterson is Vice President at First Trust, where he works with Financial Advisors to help them implement unit investment trusts, mutual funds, and ETFs into their practice.

He previously worked at Van Kampen and Invesco for 15 years selling mutual funds and UITs. Mr. Peterson has 16 years of experience in the financial services industry, and is a graduate of Loras College where he earned a degree in Mathematics and in Education.

Paul and his family currently reside in central Florida.



Ryan Newton, CFP® is a native of Albany, Georgia, Ryan relocated to Amelia Island with his family as a young boy. He earned his B.B.A. in Finance and Computer Information Systems from Mercer University, where he graduated Magna Cum Laude and was a four-year letterman on the baseball team. He also holds a Master's degree from the University of Georgia. Ryan now lives and works on Amelia Island and is an independent financial planner with Front Porch Financial Planning, Inc. He attended the Zahn Live Review in Atlanta, GA which prepared him for the July 2007 CFP Board Examination.

In addition to currently teaching Zahn Live Review, Ryan has also conducted numerous benefits training seminars for various federal agencies including Naval Criminal Investigative Service, U.S. Customs and Border Protection, Immigration and Customs Enforcement, Department of Commerce, and the U.S. Forest Service. Additionally, he holds Series 7 and 66 securities licenses as well as life, health and variable annuity insurance licenses in several states.

Over the years, Ryan has been active in the Jacksonville community, through volunteer work in the Cystic Fibrosis Foundation, and the Rotary Club of Amelia Island Sunrise. He is currently a member of the Northeast Florida Estate Planning Council, and the FPA of Northeast Florida.

In Ryan's spare time, he enjoys watching sports, playing golf, surfing, volunteering, and spending time with his wife, Katie, family and friends.