

# NEWS

For immediate release

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## Peter Montoya and Investment Advisor Magazine Announce Agenda for First-Ever TechLeaders Conference in Dallas

*Technology Conference for Independent Broker/Dealers Gives Management Teams Unique Opportunity to Experience the Latest and Greatest Technology Solutions*

DALLAS – October 11, 2011 – Peter Montoya, a nationally-known financial services industry veteran, and Investment Advisor magazine, one of the largest advisor-read publications in the independent investment management world, announced today the opening of registration for the TechLeaders 2012 Conference, the only conference focused exclusively on technology resources for Broker/Dealer management.

The inaugural conference will be held March 19-21, 2012 at the Omni Mandalay Hotel at Las Colinas in Irving/Dallas, Texas. The conference boasts 30++ presentations from technology firms who will be showcasing the newest and most innovative solutions in the industry today. Montoya founded the TechLeaders Conference in order to address the need for quality programming and well-planned agendas focused exclusively on the many ways technology can solve the issues faced by broker-dealers and registered representatives in the financial services industry.



### **Get the Inside Scoop Directly from Peter Montoya**

Listen to this eight-minute “Best Practices in the Financial Services” interview now.

<http://tinyurl.com/techleaders2012>

“There are tons of products in the marketplace whose aim is to assist Broker/Dealers and advisors, but there is a finite amount of time that these busy professionals have to devote to the

process of figuring out what's right for them at the place they are in their careers," said Montoya. "The TechLeaders Conference will allow these professionals to have an opportunity to kick the tires and figure out what works for them and how they can seamlessly integrate these solutions into their businesses. This is the one place where they can quickly see everyone and everything in the marketplace," Montoya said.

The 2012 TechLeaders conference will be supported by discussion groups, online user forums, and direct access to the technology vendors creating new solutions. The goal is to create a dialog through which new products can evolve in direct response to user need. In addition, Investment Advisor magazine will be releasing the Broker/Dealer Technology Survey Results during an awards ceremony at the conference.

In an effort to truly utilize leading edge technology, TechLeaders will also host a virtual exhibit area where those unable to attend the conference will have access material about sponsors and their products.

The cost of attending the conference is \$395, which covers the cost of conference attendance, meals and activities. A \$295 early bird rate is available for those registering before January 15, 2012. Registration details can be found at <http://techleadersconference.com/registrationform.php>

## TENTATIVE CONFERENCE AGENDA

Updates to the TechLeaders 2012 Conference schedule will be posted periodically at <http://techleadersconference.com/agenda.html>

### Monday, March 19

6:00 - 8:00 pm

Welcome Reception with Sponsors

### Tuesday, March 20

7:00 - 8:00 am

Attendee Check In/Breakfast

8:00 am - Noon

Premier Technology Vendor Presentations  
Broker/Dealer Technology Survey Results

Noon - 1:00 pm

Lunch

1:00 - 6:00 pm

Technology Vendor Presentations

8:00 pm

"Theme Party"

### Wednesday, March 21

7:00 - 8:00 am

Reception/Breakfast

8:00 - Noon

Technology Vendor Presentations

Noon - 1:00 pm

Lunch

1:00 - 3:00 pm

Technology Vendor Presentations  
Technology Vendor Conference  
(Closed Door Session; Invitation Only)

4:00 - 6:00 pm

C-Level Technology Roundtables

7:00 pm

Broker/Dealer Technology of the Year  
Awards Dinner

## **ABOUT PETER MONTOYA**

[Peter Montoya](#) is a seasoned Financial Services industry veteran with nearly 15 years of experience. Since launching his Marketing Firm in 1997, he has delivered over 1,500 presentations to Financial Professionals across the country; developed more than 5,000 custom marketing plans; authored three best-selling books, and logged over 1 million miles with United Airlines.

Peter travels more than 120 days each year to meet with his clients, their Broker/Dealers, conduct seminars and deliver presentations. He is passionate about the success of his clients and continually seeks to provide new ways for them to increase their business.

It was Peter who saw the need for and began development of the valuable resources within MarketingLibrary. It began with the idea that Financial Professionals should have ready access to high-impact, compliance-reviewed marketing materials. What started out as an idea has grown into a highly praised and utilized marketing system that now includes compliance interaction, direct mail capabilities, full-color prospecting pieces, document imaging, and among other marketing activities.

Along with his team of seasoned copywriters, designers, programmers, consultants and client service specialists - Peter continues to develop new technologies and ideas to help Financial Professionals save time, improve client satisfaction and increase their bottom lines. Peter founded TechLeaders precisely on these principles: to deliver a high-value, well-planned conference to put technology solutions into the hands of broker-dealer management.

## **ABOUT INVESTMENT ADVISOR MAGAZINE AND SUMMIT BUSINESS MEDIA**

With a circulation of 110,000, *Investment Advisor* is now in its 31<sup>st</sup> year of serving independent and independent-minded investment advisors and financial planners through its monthly magazine and online at [AdvisorOne.com](#). They are part of the Investment Advisor Group of Summit Business Media, LLC, which includes *Research* magazine and [AdvisorBiz.com](#).

[Summit Business Media](#) is the leading B2B media company serving the insurance and investment markets. Through its Media, Reference, and Events divisions, SBM publishes 16 magazines, more than 30 Web sites, 150 reference titles, and hosts a dozen conferences supporting these brands. SBM's Data Division is the leading provider of group benefits and retirement prospecting tools and insurance industry financial data.

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