

NEWS

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Technology Conference for IBD Home Office Personnel and Registered Reps Gathers Steam

New Broker/Dealer Technology Report and TechLeaders Conference Provide Tools Broker/Dealer Management Teams Need to Start Solving Technology Problems Now

DALLAS [February 2, 2012] – Peter Montoya, a nationally-known financial services industry veteran, and Chip Kispert, one of the industry’s leading technology consultants, today revealed the preliminary agenda 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.

TechLeaders—unlike any other event—has an agenda dedicated only to presenting the technology solutions that turn challenges into opportunity for the broker-dealer marketplace. Leading technology firms will be showcasing the newest and most innovative solutions in the industry today via 30+ presentations aimed at leveraging the IBD management attendee teams’ time and resources.

Discussion groups, online user forums, and direct access to the technology vendors creating new solutions will round out the 2012 TechLeaders conference plan. 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.

Montoya and Kispert founded the TechLeaders Conference to provide 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.

“There is a finite amount of time that these busy professionals have to devote to the process of figuring out what’s right for their firms,” said Montoya. “This is the one place where they can quickly see everyone and everything in the marketplace. These professionals will 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.” Kispert said.

“Sponsorship opportunities and registration will be closing on February 19th,” Montoya said. “The window to reserve a spot as an attendee or a sponsor is closing fast.”

Registration details can be found at <http://techleadersconference.com/registrationform.php>.

The preliminary agenda, which is rapidly evolving as the technology companies finalize their presentations in preparation for the March 19-21 event, can be found at <http://techleadersconference.com/conference-agenda.php>.

WHO SHOULD ATTEND

The TechLeaders Conference was developed specifically for Broker/Dealer Home Office Personnel:

- C-level executives
- HR Management
- Operations Management
- Marketing and Practice Management Teams
- Operations and IT teams
- Regional Managers or OSJs

Registered Representatives and Financial Advisors may attend as well:

- Managing Partners
- IT, Operations, or Office Managers

Start solving your technology problems. Listen to:

- TechLeaders Broker/Dealer Technology Report with Peter Montoya, Chip Kispert and industry TechLeaders:
<http://t.co/VB7GXsXC>
- Best Practices in the Financial Services Industry with Peter Montoya and Marie Swift:
<http://tinyurl.com/techleaders2012>

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, social media content and other marketing communications.

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 CHIP KISPERS



[Chip Kispers](#) founded Beacon Strategies, LLC, in 2006. He has over twenty-eight years of experience in the financial services industry. His background includes operations, account management, marketing, sales and firm management. Having worked for some of the finest securities and support firms on Wall Street, Chip now delivers his own unique perspectives and strategies to the firms that work with Beacon Strategies.

“Our vision was, and is, to establish the leading Industry Consulting and Research Group with rich relationships including broker dealers, solutions vendors and clearing firms. Beacon is dedicated exclusively to the broker dealer channel. Our services cater to firms that are interested in better understanding their industry, peers, and themselves. Our core strengths are to deliver innovative thinking with excellence in industry research, strategic and tactical broker-dealer evolution, marketing and communications support, and business acquisition linking. Our client base ranges from Fortune 1000 companies

to modest firms. As a trusted advisor we provided our clients with advances in thought, process and relationships that have added dollars to their bottom lines."

With access to hundreds of c-level broker dealer decision-makers, most c-level executives at solutions vendors, and many senior managers at clearing firms our reach is broad and filled with complex interpretation. Our interpretation takes each of the preceding groups, with their own unique perspective, and picks out the best of innovation while side-stepping the pitfalls. Our delivery mechanisms for thought-leadership and solution provider intelligence are, *The Beacon Reports*, which supply broader thought-leadership on topics impacting broker-dealers, *The Beacon 360 Solution Provider Reviews*, which supply in-depth review of solution providers, and *Northstar Reports* for those clients desiring a greater degree of specificity on focused subject matter. Of course, we also provide counsel to a great many firms in the broker-dealer marketplace.

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