



SECURITIES INDUSTRY INSTITUTE

SII2025

EXCELLENCE
IN LEADERSHIP
DEVELOPMENT

MARCH 9-14, 2025 | THE WHARTON SCHOOL, PA

Date	Start Time	End Time	Session Name	CFP® Credits	CIMA®, CPWA®, CIMC®, and RMA SM Credits
Monday, March 10, 2025	10:30 AM	12:00 PM	5 Ways to Come from a Position of Strength		1.5
Monday, March 10, 2025	10:30 AM	12:00 PM	AI and the Future of Work		1.5
Monday, March 10, 2025	10:30 AM	12:00 PM	Building Resilience: How to Thrive in Complex and Volatile Environments		1.5
Monday, March 10, 2025	10:30 AM	12:00 PM	Business and Public Policy	1.5	1.5
Monday, March 10, 2025	10:30 AM	12:00 PM	Central Banking in a Global Context	1.5	1.5
Monday, March 10, 2025	10:30 AM	12:00 PM	Unlocking the Secrets of Central Bank Communications	1.5	1.5
Monday, March 10, 2025	10:30 AM	12:00 PM	Women + Investing	1.5	1.5
Monday, March 10, 2025	1:30 PM	3:00 PM	5 Ways to Come from a Position of Strength		1.5
Monday, March 10, 2025	1:30 PM	3:00 PM	AI and the Future of Work		1.5
Monday, March 10, 2025	1:30 PM	3:00 PM	Building Resilience: How to Thrive in Complex and Volatile Environments		1.5
Monday, March 10, 2025	1:30 PM	3:00 PM	Culture Map		1.5
Monday, March 10, 2025	1:30 PM	3:00 PM	Generative AI Fundamentals and Use Cases in Financial Services		1.5
Monday, March 10, 2025	1:30 PM	3:00 PM	Market and Economic Perspectives – Ms. Perception	1.5	1.5



SECURITIES INDUSTRY INSTITUTE

SII2025

EXCELLENCE
IN LEADERSHIP
DEVELOPMENT

MARCH 9-14, 2025 | THE WHARTON SCHOOL, PA

Date	Start Time	End Time	Session Name	CFP® Credits	CIMA®, CPWA®, CIMC®, and RMA SM Credits
Monday, March 10, 2025	1:30 PM	3:00 PM	Market Returns and Fed Policy in 2025	1.5	1.5
Monday, March 10, 2025	1:30 PM	5:00 PM	Driving Innovation from Within - Double		3.5
Monday, March 10, 2025	1:30 PM	5:00 PM	Elevate Your Leadership Impact: Mastering the Art of Effective Coaching - Double		3.5
Monday, March 10, 2025	3:30 PM	5:00 PM	Artificial Intelligence and Machine Learning in Financial Services		1.5
Monday, March 10, 2025	3:30 PM	5:00 PM	Debt and Fiscal Outlook	1.5	1.5
Monday, March 10, 2025	3:30 PM	5:00 PM	Econ, Fin & Dem Trends Impacting Investing	1.5	1.5
Monday, March 10, 2025	3:30 PM	5:00 PM	High Uncertainty Innovation		1.5
Monday, March 10, 2025	3:30 PM	5:00 PM	History and Future of Money	1.5	1.5
Monday, March 10, 2025	3:30 PM	5:00 PM	Is "Globalization" Over?	1.5	1.5
Monday, March 10, 2025	3:30 PM	5:00 PM	Leading and Managing Teams in a Hybrid Work Environment		1.5
Monday, March 10, 2025	3:30 PM	5:00 PM	Leading Organizational Change		1.5
Monday, March 10, 2025	3:30 PM	5:00 PM	The Surprising Power of Respect: Powering Leadership Impact & Influence		1.5



Date	Start Time	End Time	Session Name	CFP® Credits	CIMA®, CPWA®, CIMC®, and RMA SM Credits
Tuesday, March 11, 2025	8:30 AM	10:00 AM	Ethics Y3 - Ethics and Decision Making: The Problem of Hard Questions		1.5
Tuesday, March 11, 2025	10:30 AM	12:00 PM	Corporations and Socially Divisive Issues		1.5
Tuesday, March 11, 2025	10:30 AM	12:00 PM	History of Business*	1.5	1.5
Tuesday, March 11, 2025	10:30 AM	12:00 PM	Leadership Mastery 201		1.5
Tuesday, March 11, 2025	10:30 AM	12:00 PM	Monetary Policy	1.5	1.5
Tuesday, March 11, 2025	10:30 AM	12:00 PM	Storytelling through Analytics		1.5
Tuesday, March 11, 2025	10:30 AM	12:00 PM	The AI Factor Workshop		1.5
Tuesday, March 11, 2025	10:30 AM	1:00 PM	Negotiation		1.5
Tuesday, March 11, 2025	1:30 PM	3:00 PM	Ethics Y2 - The Role of Culture		1.5
Tuesday, March 11, 2025	1:30 PM	5:00 PM	Leading Teams - Double		3.5
Tuesday, March 11, 2025	1:30 PM	5:00 PM	Strategic Persuasion: Art of Woo - Double		3.5

*History of Business – Participants will receive additional CFP® credit for completing the pre-work associated with the session.



SECURITIES INDUSTRY INSTITUTE

SII2025

EXCELLENCE
IN LEADERSHIP
DEVELOPMENT

MARCH 9-14, 2025 | THE WHARTON SCHOOL, PA

Date	Start Time	End Time	Session Name	CFP® Credits	CIMA®, CPWA®, CIMC®, and RMA SM Credits
Tuesday, March 11, 2025	3:30 PM	5:00 PM	Asset Allocation in Retirement	1.5	1.5
Tuesday, March 11, 2025	3:30 PM	5:00 PM	Balancing Shareholder and Stakeholder Interests		1.5
Tuesday, March 11, 2025	3:30 PM	5:00 PM	Blockchain and Business: A Professional's Guide to Web3		1.5
Tuesday, March 11, 2025	3:30 PM	5:00 PM	Business and Public Policy	1.5	1.5
Tuesday, March 11, 2025	3:30 PM	5:00 PM	Central Bank Balance Sheets and Financial Stability	1.5	1.5
Tuesday, March 11, 2025	3:30 PM	5:00 PM	Future of Business		1.5
Tuesday, March 11, 2025	3:30 PM	5:00 PM	Post Quantum Encryption - What is it and Why it Matters Now		1.5
Tuesday, March 11, 2025	3:30 PM	5:00 PM	Storytelling through Analytics		1.5
Tuesday, March 11, 2025	3:30 PM	5:00 PM	The AI Factor Workshop		1.5
Tuesday, March 11, 2025	3:30 PM	5:00 PM	Why People Follow the Leader		1.5
Wednesday, March 12, 2025	8:30 AM	10:00 AM	An Introduction to the Fixed Income Marketplace: From Bond Pricing Basics to Today's Fixed Income Markets	1.5	1.5
Wednesday, March 12, 2025	8:30 AM	10:00 AM	Econ, Fin & Dem Trends Impacting Investing	1.5	1.5
Wednesday, March 12, 2025	8:30 AM	10:00 AM	Ecosystem-Driven Innovation		1.5
Wednesday, March 12, 2025	8:30 AM	10:00 AM	Ethics Y1 - What does it mean to be Ethical?		1.5



Date	Start Time	End Time	Session Name	CFP® Credits	CIMA®, CPWA®, CIMC®, and RMA SM Credits
Wednesday, March 12, 2025	8:30 AM	10:00 AM	Finding New Growth Opportunities		1.5
Wednesday, March 12, 2025	8:30 AM	10:00 AM	Post Quantum Encryption - What is it and Why it Matters Now		1.5
Wednesday, March 12, 2025	10:30 AM	12:00 PM	Demystifying Networking		1.5
Wednesday, March 12, 2025	10:30 AM	12:00 PM	History of Business*	1.5	1.5
Wednesday, March 12, 2025	10:30 AM	12:00 PM	Personality Predicts Leadership		1.5
Wednesday, March 12, 2025	10:30 AM	12:00 PM	Advice for the Road		1.5
Wednesday, March 12, 2025	1:30 PM	3:00 PM	Dirty Money: The Law, Politics and Finance of Global (Anti-) Money Laundering	1.5	1.5
Wednesday, March 12, 2025	1:30 PM	3:00 PM	Market Returns and Fed Policy in 2025	1.5	1.5
Wednesday, March 12, 2025	1:30 PM	3:00 PM	Measuring Inclusion		1.5
Wednesday, March 12, 2025	1:30 PM	3:00 PM	Monetary Policy	1.5	1.5
Wednesday, March 12, 2025	1:30 PM	3:00 PM	Personality Predicts Leadership		1.5
Wednesday, March 12, 2025	1:30 PM	3:00 PM	Strategic Value of Social Impact	1.5	1.5
Wednesday, March 12, 2025	1:30 PM	3:00 PM	The Fixed Income Marketplace: From Fundamentals to Structured Products and Private Credit	1.5	1.5

*History of Business – Participants will receive additional CFP® credit for completing the pre-work associated with the session.



SECURITIES INDUSTRY INSTITUTE

SII2025

**EXCELLENCE
IN LEADERSHIP
DEVELOPMENT**

MARCH 9-14, 2025 | THE WHARTON SCHOOL, PA

Date	Start Time	End Time	Session Name	CFP® Credits	CIMA®, CPWA®, CIMC®, and RMA SM Credits
Wednesday, March 12, 2025	1:30 PM	5:00 PM	Leading Teams - Double		3.5
Wednesday, March 12, 2025	1:30 PM	5:00 PM	Strategic Persuasion: Art of Woo - Double		3.5
Wednesday, March 12, 2025	3:30 PM	5:00 PM	Applying Mindfulness at Work		1.5
Wednesday, March 12, 2025	3:30 PM	5:00 PM	Culture Map		1.5
Wednesday, March 12, 2025	3:30 PM	5:00 PM	Demystifying Networking		1.5
Wednesday, March 12, 2025	3:30 PM	5:00 PM	Emerging Trends in Information Security		1.5
Wednesday, March 12, 2025	3:30 PM	5:00 PM	ESG and Impacting Investing in Today's Markets	1.5	1.5
Wednesday, March 12, 2025	3:30 PM	5:00 PM	Private Markets	1.5	1.5
Thursday, March 13, 2025	8:30 AM	10:00 AM	Accountable AI		1.5
Thursday, March 13, 2025	8:30 AM	10:00 AM	An Introduction to ETF	1.5	1.5
Thursday, March 13, 2025	8:30 AM	10:00 AM	Developments in Retirement Risk Management	1.5	1.5



SECURITIES INDUSTRY INSTITUTE

SII2025

EXCELLENCE
IN LEADERSHIP
DEVELOPMENT

MARCH 9-14, 2025 | THE WHARTON SCHOOL, PA

Date	Start Time	End Time	Session Name	CFP® Credits	CIMA®, CPWA®, CIMC®, and RMA SM Credits
Thursday, March 13, 2025	8:30 AM	10:00 AM	Healthcare Spending	1.5	1.5
Thursday, March 13, 2025	8:30 AM	10:00 AM	How Well Do You Understand your Firm's Financial Statements?		1.5
Thursday, March 13, 2025	8:30 AM	10:00 AM	Private Equity 101	1.5	1.5
Thursday, March 13, 2025	8:30 AM	10:00 AM	Sustainability and ESG: Revenue Opportunities and Risk for Financial Services Firm	1.5	1.5
Thursday, March 13, 2025	8:30 AM	10:00 AM	The Pathologies of Decision-Making in M&A	1.5	1.5
Thursday, March 13, 2025	8:30 AM	10:00 AM	Using Stock Market History as Virtual Valium	1.5	1.5
Thursday, March 13, 2025	8:30 AM	10:00 AM	Whealthcare		1.5
Thursday, March 13, 2025	8:30 AM	10:00 AM	Why Social Security Matters	1.5	1.5
Thursday, March 13, 2025	8:30 AM	1:00 PM	Global Strategy: Design and Execution - Double		3.5
Thursday, March 13, 2025	10:30 AM	12:00 PM	Applying Mindfulness at Work		1.5
Thursday, March 13, 2025	10:30 AM	12:00 PM	Blue Ocean Strategy Session		1.5
Thursday, March 13, 2025	10:30 AM	12:00 PM	I&D: Business Imperative and Collective Impact for Financial Services Industry		1.5
Thursday, March 13, 2025	10:30 AM	12:00 PM	Leadership Mastery 201		1.5



SECURITIES INDUSTRY INSTITUTE

SII2025

EXCELLENCE
IN LEADERSHIP
DEVELOPMENT

MARCH 9-14, 2025 | THE WHARTON SCHOOL, PA

Date	Start Time	End Time	Session Name	CFP® Credits	CIMA®, CPWA®, CIMC®, and RMA SM Credits
Thursday, March 13, 2025	10:30 AM	12:00 PM	Mental Agility: Techniques to build resilience and keep your sanity at work		1.5
Thursday, March 13, 2025	10:30 AM	12:00 PM	Mid-Level ETF's	1.5	1.5
Thursday, March 13, 2025	10:30 AM	12:00 PM	Mock Securities Arbitration - Advisor on Trial		1.5
Thursday, March 13, 2025	10:30 AM	12:00 PM	Post-Merger Integration: Challenges and Opportunities	1.5	1.5
Thursday, March 13, 2025	10:30 AM	12:00 PM	Private Equity 201	1.5	1.5
Thursday, March 13, 2025	10:30 AM	12:00 PM	The Curious Leader		1.5
Thursday, March 13, 2025	10:30 AM	12:00 PM	Your Leadership Map: A Leader's Guide to Prioritizing for Impact		1.5
Thursday, March 13, 2025	10:30 AM	1:00 PM	Negotiation		1.5
Thursday, March 13, 2025	1:30 PM	3:00 PM	Catalyst		1.5
Thursday, March 13, 2025	1:30 PM	3:00 PM	Debt and Fiscal Outlook	1.5	1.5
Thursday, March 13, 2025	1:30 PM	3:00 PM	How Well Do You Understand your Firm's Financial Statements?		1.5
Thursday, March 13, 2025	1:30 PM	3:00 PM	Most Important Thing		1.5
Thursday, March 13, 2025	1:30 PM	3:00 PM	Positive Interactions at Work		1.5



SECURITIES INDUSTRY INSTITUTE

SII2025

EXCELLENCE
IN LEADERSHIP
DEVELOPMENT

MARCH 9-14, 2025 | THE WHARTON SCHOOL, PA

Date	Start Time	End Time	Session Name	CFP® Credits	CIMA®, CPWA®, CIMC®, and RMA SM Credits
Thursday, March 13, 2025	1:30 PM	3:00 PM	Using Stock Market History as Virtual Valium	1.5	1.5
Thursday, March 13, 2025	1:30 PM	3:00 PM	Why Social Security Matters	1.5	1.5
Thursday, March 13, 2025	1:30 PM	5:00 PM	Strategic Persuasion: Art of Woo - Double		3.5
Thursday, March 13, 2025	1:30 PM	5:00 PM	Using Design Thinking to Solve Business Challenges - Double		3.5
Thursday, March 13, 2025	3:30 PM	5:00 PM	Applying Mindfulness at Work		1.5
Thursday, March 13, 2025	3:30 PM	5:00 PM	Blue Ocean Strategy Session		1.5
Thursday, March 13, 2025	3:30 PM	5:00 PM	Future of Business		1.5
Thursday, March 13, 2025	3:30 PM	5:00 PM	Magic Words		1.5
Thursday, March 13, 2025	3:30 PM	5:00 PM	Market Returns and Fed Policy in 2025	1.5	1.5