

Please accept our invitation to: AAAA 2023 National V.I.S.I.O.N. Conference Gala and Awards Night.

**Date:** September 14<sup>th</sup> 2023

**Time:** 6:30 PM EST – 10:00 PM EST

**Venue:** Cherry Blossom Ballroom

## Evening Program of Events

**Evening Hostess/Emcee:** Sheena Gray MBA, Head of Diverse Advisor Experience  
J.P. Morgan Wealth Management & AAAA 2<sup>nd</sup> Vice Chairwoman of the Board

**6:30 PM EST:** Guests arrive at Cherry Blossom lobby

**6:45 PM EST:** Doors Open

**7:00 PM EST:** Guests are seated

**7:00 PM EST:** Welcome address: Rickie Taylor, First Vice Chairman, AAAA

**7:05 PM EST:** Live entertainment performance by [The Soul Influence](#)

**7:35 PM EST:** Awards and Recognition Line Up:

- *2023 Spirit of the V.I.S.I.O.N. Leadership Award*
- *2023 Strategic Partner of Year Award*
- *2023 Best Place to work for B/AA Professionals in Wealth Management*
- *2023 Excellence in Community Service*
- *2023 Top Performer Awards*
- *Passing of the Batton Ceremony:*
  - *LeCount Davis CFP® appoints Alex David Ed.D. Chairman Emeritus, AAAA*
- *Black Excellence in Service; Recognizing Board & Committee Members who are volunteers and have demonstrated Exemplary Leadership in Service to AAAA*

**8:35 PM EST:** Live Entertainment Performance by [The Soul Influence](#)

**9:00 PM EST:** Dance floor open

**10:00 PM EST:** Gala and Awards night concludes. Announcements and Farewell by Evening host Sheena Gray MBA, Head of Diverse Advisor Experience J.P. Morgan Wealth Management & AAAA Board Member

## About the AAAA 2023 Awards

### Background on the Spirit of The V.I.S.I.O.N. Award

The spirit of the V.I.S.I.O.N. [Value. Impact. Success. Influence. Optimize. Now.] award recognizes leaders in the Wealth and Asset Management Community who have dedicated themselves to promoting ethnic diversity, specifically Black/African Americans in the industry. Per Mr. Davis CFP®, ... “to effect change, diversity champions need to emerge from within the industry. You also need to understand the people and the culture of the people you are trying to reach.”

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## About the Awards [contd.]

### About the Strategic Partner of the Year Award

This award honors a strategic partner that has shown exceptional commitment and a deep understanding to AAAA's mission; supporting the professional development of Black/African American Financial Advisors and Planners. They have demonstrated excellence in their field and actively supported the AAAA in various capacities, sharing expertise, and fostering joint initiatives.

### Exceptional Employers in The Wealth Management Industry

Each year, the firms recognized span a diverse spectrum - from boutique practices employing fewer than 20 people to expansive companies boasting hundreds of professionals. Each one, regardless of size, has made a conscious investment in cultivating a workplace atmosphere and culture that not only attracts top-tier talent but also inspires the best from its team members.

### About The Top Producer Awards

This prestigious recognition aims to honor top-performing Black/African American Financial Advisors and Planners who have demonstrated exceptional leadership, unwavering dedication to their clients, and a consistent record of excellence in their work.

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## Friday September 15<sup>th</sup>, 2023

**Please accept our invitation to;** The AAAA Recognition Luncheon - Recognizing AAAA's Top Fifty Under 50 Financial Professionals in Wealth Management and Exceptional Financial Professional Development Program Graduates.

**Date:** September 15<sup>th</sup>

**Time:** 12:30 PM - 1:30 PM EST

**Venue:** Woodrow Wilson Ballroom A

## Afternoon Program of Events

**Afternoon Host/Emcee:** Alex David DPS, CEO & President Stifel Independent Advisors & AAAA Chairman Emeritus

**12:25 PM EST:** Guests arrive at Cherry Blossom lobby.

**12:30 PM EST:** Seating starts, and lunch is served.

**12:35 PM EST:** Guests are seated + Welcome by Afternoon Host, Alex David Ed.D. CEO & President Stifel Independent Advisors & AAAA Chairman Emeritus.

**12:40 PM EST:** Brief Description and Program History: Christian Nwasike MBA, JSM, MFP© MSI Fellow™ Chairman, AAAA Board of Directors.

**12:45 PM EST:** Commencement of recognition + announcement of nominees by Afternoon Host Alex David Ed.D. CEO & President Stifel Independent Advisors & AAAA Chairman Emeritus & Dana Palma Ed.D, CEPA© AAMS™, Financial Advisor, Edward Jones & AAAA Board Member.

\*Awardees pose for a photo opportunity with the Founder of AAAA, Mr. LeCount Davis CFP®, and Mrs. Jewel Davis, AAAA Program Director.

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## About the Luncheon [contd.]

**1:25 PM EST:** Congratulatory remarks to awardees by Founder of AAAA Mr. LeCount Davis CFP®

**1:30 PM EST:** Recognition event concludes. Announcements by Afternoon Host, Alex David Ed.D. CEO & President Stifel Independent Advisors & AAAA Chairman Emeritus.

## About AAAA's 50 Under 50 Black/African American Financial Professionals in Wealth Management.

The Association of African American Financial Advisors proudly recognizes the achievements and contributions of the Top Fifty Under 50 Financial Professionals in Wealth Management and graduates who excel within the AAAA Financial Professional Development Program. These exceptional individuals represent the next generation of leaders who have demonstrated outstanding professionalism, expertise, and dedication to their clients and the industry.

The AAAA's Top Fifty Under 50 Financial Professionals in Wealth Management have not only achieved remarkable success but also embody the Association's mission of promoting excellence, advancing diversity, and fostering the highest standards of professionalism in the financial advisory industry.

Selected from a pool of talented young professionals, the AAAA's Top Fifty Under 50 Financial Professionals have consistently displayed exceptional skills in wealth management, financial planning, and investment advisory services. Their commitment to excellence, innovative thinking, and unwavering client focus have set them apart as rising stars in the field.

## About the AAAA Financial Professional Development Program.

Designed to support Black/African American Financial Advisors and Planners who are at early to mid-stage careers in wealth management, this program, sponsored by Capital Group American Funds and Practice Management Consultants, LLC, equips Financial Advisors and planners with experts who will share proven strategies for business growth. These facilitators help Financial Advisors and planners better understand and communicate with their clients and target markets.

As part of the training program, participants receive one-on-one mentoring/accountability sessions to help them become the best versions of themselves.

Join us as we celebrate the accomplishments of these remarkable individuals who have already made a significant impact on their careers. Through their leadership, integrity, and commitment to diversity and inclusion, they serve as role models for future generations of Black/African American financial professionals.

-The End-

**V.I.S.I.O.N. 2023; Know Before You Go.**



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