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Schwab Advisor Services to Celebrate 30th Anniversary of Schwab IMPACT®

10/13/2020

Virtual event will include robust line-up of keynote speakers, educational content, and special experiences

SAN FRANCISCO--(BUSINESS WIRE)-- Schwab Advisor Services will celebrate the 30th anniversary of IMPACT when the annual gathering for independent advisors kicks off on Oct. 27. The longest running and largest event of its kind for the independent advisor industry, [IMPACT® 2020](#) will proceed for the first time as a virtual experience, comprised of live sessions on Oct. 27-28 and Nov. 2, 4, 9, and 11 and on-demand content and experiences available Oct. 29 through Nov. 13. The event is open to independent advisors from the more than 7,600 firms that custody with Schwab, as well as all independent advisors who custody with TD Ameritrade.

“This milestone year for IMPACT underscores our longstanding commitment to championing independent advisors’ success amid a rapidly evolving industry and an ever-changing world,” said

Bernie Clark, executive vice president and head of Schwab Advisor Services. “While this year’s event will look and feel a little different, our excitement about bringing this vibrant industry ecosystem together doesn’t change. Never has it been more important for advisors to share ideas, solutions, and best practices; expand their knowledge and hone skills; and cultivate the networks and professional communities that support their success all year long.”

Inspiring voices, timely insights

With more than 90 speakers, 70 education sessions, and nearly 40 exhibitors across investments and technology, IMPACT 2020 will offer unparalleled opportunities for learning and networking.

The conference features more continuing education credit opportunities than ever, along with the flexibility for attendees to learn on their own time with two weeks of on-demand content.

Sessions will cover timely topics like relationship-building with clients in a remote environment, fostering diversity and inclusiveness within advisory firms, improving the client experience with digital tools, and financial planning considerations related to COVID-19.

IMPACT is known for showcasing a robust line-up of inspiring keynote speakers – a tradition that will continue in 2020. [Keynote speakers](#) include Eurasia Group founder and president [Ian Bremmer](#); Harvard professor, bestselling author, and columnist for The Atlantic, [Arthur C. Brooks](#); former U.S. Secretary of Education and Emerson Collective managing partner [Arne Duncan](#); president and CEO of the Boston Red Sox [Sam Kennedy](#); Khan Academy founder and CEO [Sal Khan](#); FutureMap founder and managing partner [Parag Khanna](#); PGA TOUR commissioner [Jay Monahan](#); author and economist [Will Page](#); former Secretary of State and Hoover Institute director [Condoleezza Rice](#); renowned leadership expert [Simon Sinek](#); and chief U.S. policy strategist at AGF Investments [Greg Valliere](#). Schwab Advisor Services head [Bernie Clark](#) and Charles Schwab president and CEO [Walt Bettinger](#) will also address attendees, along with Schwab chief investment strategist [Liz Ann Sonders](#) and Schwab global chief investment strategist [Jeffrey Kleintop](#).

“We will miss connecting with advisors in person this year, but we are incredibly excited about the quality content and unique experiences attendees will enjoy at this virtual edition of IMPACT,” said Clark. “The silver lining is that the virtual format allows for more accessibility and flexibility for advisors at firms of all sizes and locations. And we are thrilled to once again include students from across the country who are working to become future leaders in the industry.”

Virtual learning, virtual fun

For the 12th year, IMPACT 2020 will welcome the next generation of advisors to learn, build relationships, and be inspired. Schwab is expecting more than 110 students from 25 universities across the country, including historically black colleges and universities (HBCUs) and Hispanic-serving institutions (HSIs). Students can engage in virtual mentoring sessions, participate in a virtual career fair, and hear from a panel of young advisors starting out in the industry. Alongside Schwab employees, students and faculty will have the opportunity to participate in virtual volunteerism by

assembling care packages that include personal hygiene items, activity books and puzzles, and school and office supplies to help uplift underserved communities.

In addition to networking and learning, IMPACT will continue its tradition of offering fun and novel experiences for all attendees. From meditation and morning exercise, to magic, music, and mixology – IMPACT 2020 will get advisors out of their day-to-day, out of their seats, and into a more inspired frame of mind. Special guest appearances by [Sting](#), [Colin Jost](#), [Sugar Ray Leonard](#), and other creative and uplifting personalities will add the spontaneity and energy to IMPACT 2020 that advisors look forward to each year.

Find more information, including the conference agenda and details on event registration, at impact.schwab.com. Schwab will share information and highlights leading up to and during the conference via [@Schwab4RIAs](#) on Twitter and by using [#SchwabIMPACT](#).

About Charles Schwab

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