

RiverFront Externship *Agenda*

Tuesday, May 19th – Thursday, May 21st

Omni Richmond Hotel | 100 S. 12th Street, Richmond, VA 23219

RiverFront Investment Group | 1214 East Cary Street, Richmond, VA 23219

Day 1: Tuesday, May 19, 2026

1:45 – 2:00 PM

Arrivals & Registration – *You will have time to check-in at the hotel before dinner*

RiverFront Investment Group | 1214 East Cary Street, Richmond, VA 23219

2:00 – 2:30 PM

Welcome & Overview (Schedule & Logistics)

Brad Wear, CDFA, CFS, National Sales Manager | Partner

2:30 – 3:00 PM

Monthly Firm Meeting

Join RiverFront Associates as we share updates and important announcements from various teams.

3:00 – 4:00 PM

RiverFront Overview & Mini Macro

Chris Konstantinos, CFA®, Managing Partner | Chief Investment Strategist

4:00 – 4:15 PM

Culture: Who is RiverFront? Our Commitment to Advisors, Associates and Community

Karrie Southall, CIPM, Chief Operating Officer | Partner

4:15 PM – 4:45 PM

Office Tour

4:45 PM – 5:30 PM

Break/Hotel Check-In

Break and check-in at hotel. Meet back at RiverFront by 5:30pm to walk to dinner.

5:30 PM – 7:30 PM

Dinner

Join RiverFront Associates and fellow Externs for a meal at a local restaurant.

Day 2: Wednesday, May 20, 2026

8:15 – 8:45 AM

Breakfast at RiverFront

8:45 – 9:00 AM

Welcome Back

Brad Wear, CDFA, CFS, National Sales Manager | Partner

9:00 – 11:00 AM

Investment Team

Roles/Career Paths, Processes & Systems, Custom Portfolio Solutions

11:00 – 11:15 AM

Break

11:15 AM - 12:15 PM

Global Strategy & Marketing

Internal Sales Team & Marketing – Areas of Focus/Roles/Career Paths

12:15 - 1:00 PM

Lunch with RiverFront Associates

Feel free to use this time to stretch your legs and take a short walk as well

1:00 - 1:30 PM

National Accounts

Bart Farinholt, Director of Corporate Strategy

1:30 -2:30 PM

Global Strategy

External Sales Team

2:30 PM - 3:00 PM

Spotlight Session: Journey to Becoming a Financial Advisor

Maicy Wear, Financial Advisor | Morgan Stanley

Join Maicy, a new MS advisor and recent college graduate, as she walks through her journey—offering insight into her process, preparation, and early experience in the field.

3:00 - 3:15 PM

Break & RiverFront Birthday Celebration

3:15 - 4:30 PM

Business Services Group

Finance Team

Compliance & Due Diligence Team

Trading & Operations Team

Using Social Media, LinkedIn & Leveraging your Interview

5:00 - 7:00 PM

Dinner

Join RiverFront Associates and fellow Externs for a meal at a local restaurant.

Day 3: Thursday, May 21, 2026 - Please bring luggage with you to the office if you are departing today.

8:15 - 8:45 AM

Breakfast at RiverFront

8:45 - 9:00 AM

Welcome Back

Brad Wear, CDFIA, CFS, National Sales Manager | Partner

9:00 -10:30 AM

Technology & Innovation Team

Todd Davis, Chief Technology Officer

10:30 -11:30 AM

Walking Tour

Richmond Walking Tour

11:30 -12:30 AM

Fireside Chat

Pete Quinn, President/CEO

12:30 PM – 2:30 PM

Lunch & Breakout Sessions with RiverFront Associates

Pick-up lunch and join your choice of RiverFront associates for informal breakout conversations. Move throughout the Office at your own pace to ask questions, learn more about their roles, and connect with team that interests you.

2:30 – 2:45 PM

Wrap Up

Brad Wear, CDFA, CFS, National Sales Manager | Partner

2:45 PM

RiverFront Departures

Turn in surveys and transportation departures

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