Kovack Advisory Evolution Forum
Canopy by Hilton-West Palm Beach Downtown
380 Trinity Place
West Palm Beach, FL 33401
Meeting Room: Banyan B, C, D

Tuesday, June 17th

12:00-2:00pm	Attendees Arrival/Hotel Check In
2:00pm	Conference Registration Opens
2:30-2:45pm	Welcome Remarks by Brian Kovack, CEO

2:50-3:30pm **Panel Discussion, Moderated by Chris Thomson, V.P. of Advisory Growth, Kovack Advisors, Inc.**

- Joel Vause, Regional Consultant, **AssetMark**
- James Molinari, VP- Structured Products and Target Outcome ETFs, South Florida, and Puerto Rico, **First Trust Portfolios**
- Jeremy Heffernan, Strategic Relations Manager, **Focus Partners Advisor Solutions**
- Landon Patterson, Advisor Growth Consultant, **Orion**
- Ron Madey, Chief Investment Officer, **Wealthcare Capital Management**

3:40-4:20pm ***"How to Plan An Epic Client Event"***
By Landon Patterson, Advisor Growth Consultant, Orion

According to Harvard Business Review, businesses that saw over 30% revenue growth over the past two years also significantly increased their event activity. The takeaway? Well-planned, memorable events don't just bring people together — they drive real business results.

In this session, we'll dive into fresh, innovative ideas for planning experiences that truly resonate. From fostering a sense of community to creating lasting impressions, you'll walk away with actionable ideas to make your events more engaging, impactful, and growth-driven.

4:20-5:00pm ***"Are you Bullish, Bearish or Buffered?***
By Christopher Mortimer, Managing Director, Vest Financial

Markets don't move in straight lines—and neither should your risk strategy. This session dives into how Buffer ETFs help clients stay invested, sleep at night, and avoid panic-selling when volatility hits. We'll cover the mechanics, the mindset, and how advisors are using them to turn risk into resilience.

6:00-6:30pm	Networking Cocktail Reception	Banyan Glass Foyer
6:30-8:30pm	Networking Dinner	Banyan A&B

Wednesday, June 18th

8:00-9:00am	Networking Breakfast
9:00-9:30am	**Fireside Chat w/Envestnet-**
9:30-10:15am	**Envestnet Demo** By Lyndsey Bielinski, Envestnet
10:30-11:10am	**TBD** By Joel Vause, Regional Consultant, **AssetMark**
11:20-12:00pm	**TBD** By Ron Madey, Chief Investment Officer, Wealthcare Capital Management
12:00-1:00pm	Networking/Working Lunch
1:15-1:55pm	**"How Technology and AI are Transforming Wealth Management"** By TBD, Fidelity
2:00-2:40pm	***"How an Advanced Planning Team Can Help You Win HNW Cases"*** By Panch Romero, Regional Director, Focus Partners Advisor Solutions This session serves as an overview of the areas Focus Partners' Advanced Planning team can support. This discussion will go into detail regarding the resources and content we have available, and how the team cam support Kovack advisors working with Focus Partners with case design and wealth planning conversations.
2:45pm	Closing Remarks