

## Monday, October 6th

7:00am-3:00pm	Conference Registration Desk Open	North Foyer
7:00am-8:00am	Continental Breakfast	Tavistock Ballroom ABC
7:00am-12:00pm	Exhibits Open	Tavistock Ballroom ABC
8am-11:00am	<b><i>Technology Enhancements Overview</i></b>	Tavistock Ballroom D & Highbourne
11:45am-12:45pm	Lunch Buffet	Tavistock Ballroom ABC
1:00pm-1:30pm	<b><i>“Chairman’s Welcome &amp; Fireside Chat”</i></b> <i>By Brian Kovack, CEO &amp; Andy Powers, Chief Technology Officer</i>	Aviva Ballroom
1:30pm-2:30pm	<b><i>General Session #1</i></b> <i>By Strider Ellas, First Trust</i>	Aviva Ballroom
2:40pm-3:40pm	<b><i>“The Future of Advice: Harnessing AI for Extraordinary Client Experiences” –Orion</i></b>	Aviva Ballroom
	<p>Artificial intelligence is reshaping the way financial advisors connect with their clients. In this engaging session, you’ll explore how AI is transforming wealth management by enhancing personalization, deepening client relationships, and scaling practices. Learn what clients really think about AI, gain insights into the future of advisory services, and discover how Orion’s cutting-edge AI technologies are empowering advisors today — and what’s on the horizon.</p>	
3:50pm-4:50pm	<b><i>“Your Health Keeps Score”</i></b> <i>By Chris Johnson, Founder/CEO, On Target Living</i>	Aviva Ballroom
	<p>Your Body Is Talking—Are You Listening? This presentation covers three educational, engaging and eye-opening topics:</p> <ul style="list-style-type: none"> <li>• Stress, Anxiety, Mental Health, Space &amp; Pace</li> <li>• Sleep, Big 3, Balancing Your Nervous System to have a healthy immune system!</li> <li>• Learning how to put more REST &amp; REJUVENATION back into your Life!</li> </ul>	
6:00pm-7:00pm	Cocktail Reception	Aviva Lawn (outside)
7:00pm	Dine-Arounds hosted by various sponsors	<b><i>(By Invitation Only)</i></b>

# Tuesday, October 7th

6am-7am	<b><i>MOVE Session</i></b> <i>With Chris Johnson, Founder/CEO, On Target Living</i>	
7:00am-3:00pm	Conference Registration Desk Open	<b>North Foyer</b>
7:00am-8:00am	Hot Breakfast Buffet	<b>Tavistock Ballroom ABC</b>
8:00am-8:15am	Welcome	<b>Aviva Ballroom</b>
8:15am-9:15am	<b><i>"Successful Prospecting Strategies"</i></b> <i>By Rico Casares, Director of Business Consulting, AssetMark</i>	<b>Aviva Ballroom</b>

Prospecting is an important part of your firm's business and growth strategy. Prospecting, done right, not only leads to new clients, but it can also help to position you as a trusted advisor within your community. Within this session, we will discuss why a clearly defined prospect process is necessary in today's crowded advisor marketplace. In addition, we will highlight a number of prospecting strategies. Finally, we will share with you a framework, along with supporting resources, to successfully shepherd prospects through.

9:30am-10:30am	<b><i>General Session #5</i></b> <i>By David McSweeney, Vice President, Enterprise Security, Fidelity</i>	<b>Aviva Ballroom</b>
10:45am-11:45am	<b><i>"Creating a Cornerstone for Your Client's Legacy Plan"</i></b> <i>By Alan Roman, Director Product &amp; Advanced Strategies, TruChoice Financial</i>	<b>Aviva Ballroom</b>

Wills, Trusts, and Estates - Estate planning is much more than worrying about estate taxes. In fact, the vast majority of clients should be more focused on non-estate tax driven decisions. In this presentation we will discuss estate planning concepts and strategies that should be the cornerstone of any client's legacy plan.

11:45am-12:30pm	Lunch Buffet	<b>Tavistock Ballroom ABC</b>
12:45pm-3:15pm	<b>Breakout Sessions</b>	

Aviva Ballroom	Tavistock Ballroom D	Highbourne AB
Sponsor Breakouts	Sponsor Breakouts	Advisory Breakouts

12:45-1:15pm	<b>Sponsor Breakout #1</b> <i>TruChoice</i>	<b>Aviva Ballroom</b>
12:45-1:15pm	<b><i>"Maximizing Opportunities: Business Tools for Smarter Client Conversations"</i></b> <i>By Kelly Chapple, Divisional Sales Manager, Eagle Life</i>	<b>Tavistock Ballroom D</b>

This session explores practical tools and strategies to help identify growth opportunities within your book of business, uncover new business, and enhance client interactions. We will cover techniques to streamline communication, tailor outreach, and leverage data-driven insights to make conversations more effective and outcomes more impactful.

12:45-1:15pm	<b>Advisory Breakout #1</b> <i>AssetMark</i>	<b>Highbourne AB</b> TBD
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1:25-1:55pm	<b><i>"Cracking the Connection Code"</i></b> By TBD, Athene	<b>Aviva Ballroom</b>
1:25-1:55pm	<b>Sponsor Breakout #4</b> <i>Advisors Capital</i>	<b>Tavistock Ballroom D</b>
1:25-1:55pm	<b>Advisory Breakout #2</b> <i>Orion</i>	<b>Highbourne AB</b>

2:05-2:35pm	<b>Sponsor Breakout #5</b> <i>Equitable</i>	<b>Aviva Ballroom</b>
2:05-2:35pm	<b>Sponsor Breakout #6</b> <i>Preferred Capital</i>	<b>Tavistock Ballroom D</b>
2:05-2:35pm	<b>Advisory Breakout #3</b> <i>Howard Capital</i>	<b>Highbourne AB</b>

2:45-3:15pm	<b>Sponsor Breakout #7</b> <i>Nationwide</i> Matt Joki, National Sales Director, Nationwide RILA	<b>Aviva Ballroom</b>
2:45-3:15pm	<b>Sponsor Breakout #8-</b> <i>Pinnacle</i>	<b>Tavistock Ballroom D</b>
2:45-3:15pm	<b>Advisory Breakout #4</b> <i>Focus Partners</i>	<b>Highbourne AB</b>

6:00pm-7:00pm	Cocktail Reception*	Adult Pool Deck (outside)
7:00pm-10:00pm	Buffet Dinner	Adult Pool Deck (outside)

*\*Please note that the reception and dinner is outdoors.*

## Wednesday, October 8th

7:00am-12:00pm	Conference Registration Desk Open	North Foyer
7:00am-8:00am	Hot Breakfast Buffet	Tavistock Ballroom ABC
8:00am-8:15am	Welcome	Aviva Ballroom
8:15am-9:15am	<b>General Session #7— Pershing</b>	Aviva Ballroom
9:30am-10:30am	<b>Annual Compliance Meeting-MANDATORY</b> <i>By Kovack Compliance Department</i>	Aviva Ballroom
10:30am	<b>Closing Remarks</b> <i>By Brian Kovack, CEO</i>	Aviva Ballroom
10:45am	<b>Hotel Check-out and Safe Travels Home!</b>	