“Blueprint 2026: Branding, Digital Marketing & Communication Excellence”
The Dalmar
299 N. Federal Hwy
Fort Lauderdale, FL 33301
Meeting Room: Brant & Ibis (4th floor)

Tuesday, February 17th

2:00pm	Conference Registration Opens
2:30-2:45pm	Welcome Remarks

2:50-3:30pm ***“Hosting Client Experiences to Delight Clients & Strengthen Relationships”*** By Sharon Sullivan, Sr Account Manager-Marketing Strategy **TruChoice Financial Group**

Client appreciation goes beyond financial guidance—it’s about building trust, connection, and loyalty. One of the most effective ways to do this is through well-planned client events that leave a lasting impression. This practical presentation will cover:

- Types of Client Events – From appreciation to education
- Annual Event Planning – Building a balanced calendar that works
- Deep Dive into 5 Client Events – Proven ideas you can implement
- Client Referral Events – How to grow your business through experiences

You’ll walk away with fresh inspiration and actionable strategies to help strengthen relationships, build loyalty, and even generate referrals through events that clients will remember.

3:40-4:20pm ***“The Future of Advisor Marketing & Client Acquisition”*** By Peter Galloway, **ClientGen/Pinnacle Marketing**

You won’t want to miss this new partnership announcement: two growth resources in one quick, high-impact session. *ClientGen* shows how advanced data intelligence and a robust communications platform help you engage the right opportunities at exactly the right moment. *Pinnacle Marketing* helps you *‘Be Seen, Be Heard, and Be Known’* so the right prospects can find you, recognize your value, and choose you with confidence.

4:20-5:00pm ***“New Product Spotlight: Cliffwater Private Credit”*** By Craig Arsenault, Director, **Cliffwater**

6:00-6:45pm	Cocktail Reception	Sparrow Rooftop
7:00-9:00pm	Networking Dinner	Dalmar I & II

Wednesday, February 18th

7:45-8:30am	Networking Breakfast
8:40-9:20am	***"Growth Without the Grind: Using Marketing to Turn Clicks into Clients"*** By Nicholas Russello, Mid-Market Sales Representative, **Broadridge Advisor Solutions** If you're like 85% of advisors, finding time for marketing is one of the biggest challenges to driving growth. With limited resources, it is hard to know what is actually worth your effort. Join Broadridge Advisor Solutions for an informative session on how you can use digital marketing to attract new clients, without adding to your workload. You will learn how AdvisorStream and Broadridge's Advisor Websites work together to help you drive engagement, enhance credibility, and support scalable growth for your business.
9:20-10:00am	***"The Sandwich Generation"*** by Patti Hausherr, V.P. of Sales Strategy, **Athene** This presentation will help clients overcome decision-making roadblocks when planning for retirement • Why protected lifetime income may be more important today • What hurdles Americans face when making decisions about investing • How to lead clients in making informed decisions
10:15-10:55am	***"TBD"*** By Rico Casares, Director Business Consulting, **AssetMark**
11:00-11:30am	***"Leveraging Trust Services to Enhance AUM Growth and Retention"*** by Michael Sciulli, VP, Wealth Management Consultant, **Members Trust** In today's competitive financial landscape, retaining clients and building multi-generational relationships is more crucial than ever. It's known that a client relationship can span decades yet disappear in days after a client passes. Join Members Trust Company, an Advisor-Friendly Trust Company offering Delegate/Directed Trust solutions, to focus in on a powerful solution that can help not only protect clients' assets for the next generation but also help protect your own book of business.
11:30am-12:30pm	Lunch & Raffle
12:40-1:20pm	***"New Product Spotlight"*** By Chris Lockwood, Senior VP, Capital Markets, **Cottonwood**
1:20-2:00pm	***"Communicating with Empathy***" By Preston Suttmiller, Advisor Growth Consultant, **Orion** Good communication sets the ceiling for the efficacy of financial advice; advice is only as good as its delivery. Bearing this in mind, this presentation gives a framework for providing advice that sticks and gives advisors a researched-backed system for communication that promotes both better understanding and stronger bonds with clients.

You'll learn:

- How to develop empathy and employ it in client communications
- How to develop "unforgettable" client communications
- Understand and adapt to the industry trends of what investors seek in an advisor, and how to access the education and solutions to accomplish this

2:00pm Closing Remarks