

“Invested in Her: How Advisors Can Better Serve Women Investors”

The Seagate Hotel & Spa
1000 E. Atlantic Ave
Delray Beach, FL 33483
Meeting Room: Reef Ballroom



Tuesday, June 16th

2:00pm Conference Registration Opens

2:30-2:45pm Welcome Remarks

2:50-3:30pm ***“Sponsor Panel Discussion”***
Moderated by Chris Yarosh

3:40-4:20pm ***“Say This Not That: A Practical Guide to Communicating Effectively with Women and Couples Across Generations”*** By Curt Hruska, Wholesaler, ***Guaranty Income Life Insurance Company***

In the next decade, women are expected to control nearly \$30 trillion in investable assets, yet they remain significantly behind in retirement savings, representing a massive, missed opportunity for the financial industry. This marketing campaign and presentation titled Win Her Trust, aims to address the often-overlooked needs and preferences of women in retirement planning, providing financial professionals with insights and strategies to better attract and retain female investors.

4:20-5:00pm ***“CIRE Equity & First Trust | A Private Real Estate Investment Built for Tax-Efficient Growth”*** By Ben Hilgers, Director of Investor Relations, CIRE Equity and Ronnie Muck, National Accounts, ***First Trust Portfolios***

In a market crowded with complex, layered fund structures, CIRE Equity takes a different approach — direct ownership of institutional-quality real estate designed to generate tax-advantaged income and long-term appreciation. In partnership with First Trust, we're bringing this evergreen private real estate strategy to financial advisors and their clients who demand transparency, durability, and results.

6:00-6:30pm Cocktail Reception Beach Club Upper DR

6:30pm-8:30pm Networking Dinner Beach Club Upper DR

Wednesday, June 17th

7:45-8:30am Networking Breakfast

8:40-9:20am ***“Corebridge Action Planner Series for Women”*** by Joe Cavaliere, Divisional V.P.,
Corebridge Financial

While women are gaining financial power and now control about one-third of total household financial assets in the US, they are still experiencing specific challenges, like outliving their spouse, greater health and long-term care costs.

This presentation in the Action Planner series digs into the obstacles and opportunities that may lie ahead, We will discuss things like saving, investing and preparing for the future. It offers key insights, ideas and actions steps to help women get to where they want to go.

9:20-10:00am ***“Marketing Services & Women’s Events: Strategies That Connect”*** By Michael
***Bacchus, Divisional Vice President – Advanced Annuity Sales, TruChoice Financial
Group***

This presentation focuses on helping advisors engage and grow their female client base through targeted Social Security seminars, meaningful client appreciation events, and community-driven charitable initiatives. It also highlights the importance of strengthening your brand through social media and AI-driven strategies, with an emphasis on SEO and AIEO to increase visibility and attract the right audience.

10:15-10:55am ***“Positioning Your Practice to Serve More Women”*** by Roberta Eckert, Retirement
Strategy and Solutions Vice President, Nationwide

It’s estimated that \$34 trillion in assets will shift into the hands of U.S. women by 2030. More women are taking charge of household finances, with 49% of women now considering themselves to be the household CFO. And yet they still face unique challenges that men don’t, such as lower Social Security benefits (often due to lower wages or time out of the workforce) and their statistical edge in longevity. This presentation covers the topics that are especially important to your female clients, including:

- Maximizing Social Security benefits
- Preparing for health care expenses in retirement
- Considering long-term care coverage

11:00-11:40am

“Capturing & Retaining Assets”

*By Christina Bilenler, Enterprise Business Consultant, **AssetMark***

Over 80% of investors indicate they plan to transfer wealth to loved ones, but less than half of those have a plan in place to do so. Additionally, many advisors are facing the harsh reality that they have an aging client base and very little interaction with the next generation. Within this session we share generational trends, ways to engage the next generation and review the importance of preparing families for the inevitable transfer of wealth.

Resource: Family Preparedness Planning Guide

11:40am-12:30pm

Lunch

12:40-1:20pm

“New Product Spotlight: Holistiplan” by Kate Laws, Partnership Relationship Manager, **Holistiplan**

Holistiplan is a fast-growing company in the FinTech sector, serving more than 50,000 users across the advisory community. Its award-winning software empowers financial advisors to deliver comprehensive financial planning at scale, bringing together tax planning, P&C insurance analysis, and estate planning in a single, unified system.

One document in your client relationships consistently reveals new opportunities: the tax return, which is where your best 2026 growth is hiding.

1:20-2:00pm

“The Growing Influence of AI in the Industry & How Advisors Can Use It” by Kyle Hosch, Business Development Consultant, **Orion**

In this presentation, attendees will learn about the functionalities of ChatGPT, exploring how to leverage its capabilities for various applications, from content creation to problem-solving. Emphasizing dos and don'ts, the audience will gain insights into ethical and responsible AI usage.

Drawing parallels to previous industrial revolutions, the talk will discuss how the advent of AI, exemplified by ChatGPT, transforms communication and problem-solving akin to past revolutionary shifts in industry and technology.