# EVENT OF THE YEAR THE SPARK EFFECT 2026

## TUESDAY, APRIL 21ST

12:00PM - 5:00PM GALLERY — Check In @ Welcome Desk

6:00PM - 8:00PM SANDBAR — Welcome Party & Dinner
*All attendees & guests are welcome*

## WEDNESDAY, APRIL 22ND

7:30AM - 8:30AM TERRACE — Breakfast & Networking

8:30AM - 10:00AM BALLROOM — Opening Kickoff (Matt Reynolds & Regina Rudnick)

**Freedom Within Frameworks: Navigating the Future of Technology & Regulatory Standards** (Executive & Advisor Panel) The future of financial advice is human-led and tech-empowered. How do you embrace the efficiency of emerging technologies and AI while staying on the right side of evolving SEC and FINRA expectations? Join us for a view into the firm's tech philosophy, balancing the need for speed with the necessity of regulatory compliance. Learn how we are building a secure, flexible ecosystem where independent advisors can select the tools that fit their unique business model. Learn about our rigorous vetting process, our stance on data privacy, and how we are building a safe digital environment for you to innovate with confidence.

10:00AM - 10:15AM — Break & Visit with Sponsors ---- Gallery

10:15AM - 11:15AM — AI Trends & What They Bring to Your Practice: Current and Future State (Special Guest Speaker TBA) More to come...

11:15AM - 11:30AM — Transition break & visit our sponsors ---- Gallery

11:30AM - 12:00AM — Breakout Sessions

**Advisor Gateway: Explore First Clearing's Next Gen Platform ----- Ballroom**
**(First Clearing & Home Office team)** Join the experts to take a deep dive into First Clearing's new advisor platform, Advisor Gateway, their unified cloud platform that consolidates all essential advisor tools in a single hub. Gain efficiencies, leverage new tools and capabilities, and function and grow with purpose.

**Navigating the Small Business Health Insurance ----- Marlin**
**(Andy Harrington & ORG)** Small business owners face unique challenges when it comes to offering benefits, including health insurance, and advisors are often a trusted source they turn to for guidance. This session will introduce you to an innovative, referral solution through BLG Benefits that may provide a framework for you and your business owner clients. Through real-world scenarios, you'll see how these may play out in practice.

12:00PM - 1:00PM TERRACE & MARLIN — Lunch & Networking - Women's Impact Network (WIN) Lunch in Marlin

1:00PM - 3:00PM — General Session ----- **Ballroom**

**Go There. Ask Her℠ (Special Guests Linda Sherman, Joy Cohen)**
This Financially Empowered® program focuses on retaining and attracting female clients by delivering Practice management strategies on financial, estate, and insurance planning that lead to growth in revenue, referrals, and retention. The session includes an advisor playbook, guides and action plan. Women will control 2/3rds of household wealth by 2030 representing more than half of an Advisors book and larger than US GDP! Yet...70% of married women still fire their Advisors within a year of losing their partner. Give her reasons to stay and be the Advisor women move to. We'll show you HOW.

**The Next Frontier of Growth: How Estate Planning is Transforming the Modern Advisor's Practice (Advisor Panel)** Growth in wealth management is entering a new era, and estate planning has emerged as one of the most powerful levers for driving both organic and inorganic growth. Successful advisors recognize the value of helping clients connect their wealth to personal values, family priorities, and long-range legacy goals. This session explores how advisors are introducing estate planning to deepen client relationships, unlock new revenue channels, and deliver an elevated experience at scale.

**The Content Machine: From One Spark to 30 Days of Strategic Visibility (Brian Adams, Creative Director)** You Don't Need More Content. You Need a Machine. What if one meaningful idea could power your entire month of marketing? In this session, you'll learn a simple, repeatable 4-week system that turns a single spark into consistent, high-quality content that builds recognition and trust. No random posts. No scrambling. Just rhythm, clarity, and results.

Afternoon & Evening — **Free Time**