



2026

**THURSDAY,
APRIL 23RD**

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

8:30AM - 10:15AM General Session
BALLROOM

Advisor & Industry Trends: A Fireside Chat with John Peluso & Tony Sirianni, CEO/Publisher of AdvisorHub Current industry and advisor insights and Q&A with two prominent industry veterans

Mega Trends: The Next American Supercycle (Clint Sorenson, CIO TruEdge Asset Management) In this engaging market commentary, Clint Sorenson, Chief Investment Officer of TruEdge Asset Management, will share three megatrends that will be driving investment outcomes over the next ten years, what opportunities they present, and why this is a great time to be an advisor.

Beyond the Portfolio: Elevating Your Value with Family Office Services

As investment management becomes increasingly commoditized, how can you deepen client loyalty and attract more sophisticated prospects? The answer lies in evolving from an investment advisor to a holistic wealth steward. Upper affluent and core HNW clients are becoming the new center of gravity for both volume and margins. Everyone sees the opportunity; few have cracked the code. This session explores how integrating "Family Office" capabilities – such as advanced tax planning, multigenerational governance, and lifestyle management – acts as a powerful differentiator. Learn how to position your firm as the central hub for your clients' entire financial lives, moving beyond the portfolio to deliver comprehensive, long-term value.

10:15AM - 10:30AM Break & Visit with Sponsors ---- Gallery

10:30AM - 11:00AM **1031 Exchanges & DSTs: Their place in tax strategies, wealth management and estate planning**
BALLROOM
While 1031 exchanges are known as a great way to defer taxes when selling investment real estate, there are many ways exchanges are used in managing all real estate assets. The gain on almost any piece of real estate can be deferred or eliminated with enough planning, including highly appreciated primary residences and second homes. Exchanges are also useful for planning estate distribution to avoid family conflict. This session will also address areas of caution that need to be avoided or planned for.

11:00AM - 11:30AM Transition break ---- Gallery

11:30AM - 12:10AM Breakout Sessions

How to Address Risks in Social Security Planning (Advisor Discussion) ----- Ballroom

Social Security claiming strategy is at the core of many people's retirement plan, and the topic of optimal planning is a lively area of debate. Many assume that Social Security planning is a simple matter of calculating monthly benefits amounts and projected total lifetime benefits. However, effective planning goes beyond the basics to explore important but underappreciated risks like (i) the uncertainties of lifespan (mortality risk and longevity risk), (ii) the effects of claiming on retirement portfolios (sequence-of-returns risk), (iii) the risk that the program may change in the future (policy risk), and (iv) the tax effects of aligning Social Security benefits with significant tax events (tax risk). This session will explore these considerations and give practical, real-world insights you can apply with clients right away.

The AUM Accelerator: Next-Generation, Powerful Tax Strategies for the Modern Financial Advisor (Sponsor & Advisor Discussion) ----- Marlin

Provide your clients the full potential of tax-advantaged investing in today's evolving investment landscape. This presentation takes a deep dive into the evolution of Opportunity Zone investing — comparing the foundational strategies of OZ 1.0 with the enhanced mechanics and benefits of OZ 2.0 — and exploring the powerful tax mitigation and after-tax returns available through Passive Income Generator (PIG) and Passive Activity Loss (PAL) investing. Advisors will leave with actionable strategies to reduce client tax burdens, strengthen portfolio performance, and position themselves as elite tax-aware wealth builders — driving meaningful, measurable growth in Assets Under Management.

12:15PM - 1:15PM Lunch & Networking
TERRACE & MARLIN

1:15PM - 2:00PM General Session
BALLROOM

1:15PM - 2:00PM **Private Investments 101 (Panel Discussion)**

With the expansion of product offerings in recent years, introducing private investments as a solution to clients is on the rise. Many advisors have expressed an interest in learning about how to offer and manage private investments. This presentation is designed to help advisors build a foundation in private investments to:

- Analyze client financial profiles to determine the appropriateness of private investments and explain to clients the nature and portfolio role of private investments.
- Evaluate different types of private investments and their fund structures to select appropriate options for client portfolios based on individual client needs and circumstances.
- Apply key evaluation criteria to assess potential partners and service providers who can support the implementation of private investment strategies for clients.

2:00PM - 2:45PM **Are you Prepared? Cybersecurity Strategies & Digital Trust (Panel Discussion) **CE CREDIT****
In an era where digital threats are evolving rapidly, cybersecurity awareness is more critical than ever. This session will help you effectively assess and manage risks posed by vendors and third-party relationships. In our industry, now it is more important than ever to ensure you can identify your weaknesses and create your checklist to ensure you are prepared. By strengthening your cybersecurity posture, you'll not only safeguard client information but also reinforce the trust and confidence that are the foundation of your practice.

Afternoon **Free Time**

6:30PM - 9:30PM **Start with a Spark...End with a Band! Cocktail Reception, Plated Dinner, Live Band & Dancing**
BALLROOM