

## Tuesday, September 29th

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| 8:00 - 12:00  | Golf Outing - Quit Qui Oc Golf Course<br>Coffee Pontoon Boat Ride                                                                                                                                                           |                                                                                                    |
| 12:00 - 12:45 | Check-In   Exhibits   Lunch                                                                                                                                                                                                 |                                                                                                    |
| 12:45 - 2:15  | Practice Management Roundtable Talks: Collaborate with Your Fellow FPA Members (no CE)<br><i>Topics include: Marketing, Practice Management, Technology/AI, Scaling Your Practice, Behavioral Advice, Crisis Management</i> |                                                                                                    |
| 2:15 - 2:30   | Break   Exhibits                                                                                                                                                                                                            |                                                                                                    |
| 2:30 - 3:20   | Future-Ready Practices: Growth Strategies for Advisors<br>Chuck Orban - Edward Jones                                                                                                                                        |                                                                                                    |
| 3:20 - 3:30   | Break   Exhibits   Networking                                                                                                                                                                                               |                                                                                                    |
| 3:30 - 4:20   | The Hidden Risks (and Potential Rewards) of<br>Private Real Estate Investing<br>Shawn Swenson & Pat Carroll - Investors Associated                                                                                          | Youth Breakout: One Career, Many Paths: How<br>Firm Size Shapes the Advisor Experience (no CE)     |
| 4:20 - 4:40   | Break   Exhibits   Networking                                                                                                                                                                                               |                                                                                                    |
| 4:40 - 5:30   | TBD<br>Speaker - Company                                                                                                                                                                                                    | Youth Breakout: Building Expertise: Designations,<br>Niches, and Serving the Right Clients (no CE) |
| 5:30 - 8:00   | Reception                                                                                                                                                                                                                   |                                                                                                    |

## Wednesday, September 30th

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| 7:45 - 8:30   | Check-In   Continental Breakfast   Exhibits                                                                                                 |                          |
| 8:30 - 8:45   | Welcome   Announcements   Partner Introductions                                                                                             |                          |
| 8:45 - 9:45   | Influence, Decision-Making, and the Fiduciary Advisor: A Behavioral Framework for Client Conversion<br>Evan Beach - Exit 59 Advisory        |                          |
| 9:45 - 10:00  | Break                                                                                                                                       |                          |
| 10:00 - 10:55 | Unlocking Generosity Through Non-Cash Giving Conversations<br>Jeff Waldron - National Christian Foundation                                  |                          |
| 10:55 - 11:10 | FPA WI Business & Announcements                                                                                                             |                          |
| 11:10 - 11:30 | Partner Introductions                                                                                                                       |                          |
| 11:30 - 11:40 | Break   Exhibits   Networking                                                                                                               |                          |
| 11:40 - 12:30 | TBD<br>Speaker - Company                                                                                                                    | TBD<br>Speaker - Company |
| 12:30 - 1:15  | Lunch                                                                                                                                       |                          |
| 1:15 - 2:10   | Social Security - Making Informed Decisions<br>Daniel Hurley - Social Security Informed                                                     |                          |
| 2:10 - 2:25   | Break   Exhibits   Networking                                                                                                               |                          |
| 2:25 - 3:15   | Collaborative Learning Event: Helping Your Clients Prepare & Receive An Inheritance<br>Mike Smith - Horizon Financial, a Simplicity Company |                          |
| 3:15          | Closing Remarks & Adjourn                                                                                                                   |                          |