CAMBRIDGE

IGNITE 2026

AGENDA

Wednesday, September 16		
Time	**Session**	**Location**
8:00 a.m. – 8:00 p.m.	**Registration and Information Desk Open**	City Hall Lobby
Noon – 12:50 p.m.	**Key Drivers and Influencers of Valuation**, Bud Montang, Cambridge	101
Noon – 12:50 p.m.	**SEO Meets AI: Strengthening Your Website and Online Presence,** Ian Bee, Cambridge	102
Noon – 12:50 p.m.	**From Founder-Led to Team-Led Growth: Delegating Without Losing Control,** Stephanie Little, Cambridge	208
Noon – 12:50 p.m.	**From Manual to Governed: Scaling Portfolios with UMAs,** Joey Hodgins, Cambridge	209
Noon – 12:50 p.m.	**Getting Started With CLIC® Advisor: Features, Access, and Support,** Heather Becklund, Cambridge	210
Noon – 12:50 p.m.	**WealthPort® Trading Overview,** Austin Martin, Cambridge	Sarasota 1-3
Noon – 1:15 p.m.	**Annual Compliance Meeting (ACM) and Anti-Money Laundering (AML),** *(Must be present for entire session to receive credit)* , Steve Youhn, Cambridge	106
Noon – 2:00 p.m.	**CFP® Ethics** *(Pre-registration required)* , Kaplan	107
1:00 p.m. – 1:50 p.m.	**AI Agents: Streamlining Processes to Scale Growth,** Colton Smith, Cambridge	101
1:00 p.m. – 1:50 p.m.	**Getting More from CLIC Workstation: Features Available Today and What's Coming,** Quenton Dodson, Cambridge	102
1:00 p.m. – 1:50 p.m.	**From Client Concern to Arbitration: Decisions That Shape Outcomes,** Rick Kuhlman, Cambridge	208
1:00 p.m. – 1:50 p.m.	**Supervisor Lab: Firelight and Document Supervision,** Kyle Summers, Cambridge	209
1:00 p.m. – 1:50 p.m.	**Getting More From CLIC Advisor: Best Practices and Hidden Capabilities,** Heather Becklund, Cambridge	210
1:00 p.m. – 1:50 p.m.	**WealthPort: Developing Your Trading Process and Procedure,** Austin Martin, Cambridge	Sarasota 1-3

1:30 p.m. – 2:45 p.m.	**ACM + AML *(Must be present for entire session to receive credit)*** , Andrew Bowers, Cambridge	106
2:00 p.m. – 2:50 p.m.	*Cambridge Advisory Councils Meeting (Invite only)*	*103*
2:00 p.m. – 2:50 p.m.	**From Use Case to Solution: Live AI Builds You Can Replicate,** Colton Smith, Cambridge	101
2:00 p.m. – 2:50 p.m.	**Powering Your Digital Marketing Goals: Inside the New Source Marketing Platform,** Ian Bee, Cambridge	102
2:00 p.m. – 2:50 p.m.	**Retirement Plan Growth: Finding and Using the Right Tools at Cambridge,** Mark Thornton, Cambridge	208
2:00 p.m. – 2:50 p.m.	**Supervising GenAI with Confidence: Practical Guidance and Real-World Scenarios,** Susan Dougherty, Cambridge	209
2:00 p.m. – 2:50 p.m.	**Advanced Planning Techniques and Deliverables in CLIC Advisor,** Scott Bakley, Cambridge	210
2:00 p.m. – 2:50 p.m.	**WealthPort: Tax Management Tools,** Austin Martin, Cambridge	Sarasota 1-3
2:30 p.m. – 3:15 p.m.	*First-time Attendee Reception*	*Emerald Bay Plaza*
2:30 p.m. – 3:15 p.m.	*Commitment to Inclusion Advisory Council Happy Hour (Invite only)*	*Captiva 1-2*
2:30 p.m. – 3:15 p.m.	*Real Practice Management (RPM) Happy Hour (Invite only)*	*107*
3:30 p.m. – 6:15 p.m.	**General Session**	Osceola Ballroom
	Welcome and Charity Introduction	
	The Future of Advice, Independence, and AI, Eric Schwartz and Amy Webber, Cambridge	
	Building a Thriving Business in a High-Velocity World, Amy Webber, Cambridge	
	12th Annual Spirit of Cambridge Awards	
	Unreasonable Hospitality, Will Guidara	
6:30 p.m. – 9:30 p.m.	*Welcome Reception (Guests welcome)*	*Florida Exhibition Hall D-F*
6:30 p.m. – 9:30 p.m.	**Expo Hall Hours**	Florida Exhibition Hall D-F
6:00 p.m. – 9:00 p.m.	**Professional Headshot Hours**	Destin 1-2
6:30 p.m. – 6:50 p.m.	**Scaling Smarter with Source: Revised Services for Growth and Efficiency,** Ian Bee, Cambridge	Theater A
6:30 p.m. – 6:50 p.m.	**RightBRIDGE Explained: Supporting Confident Annuity Recommendations,** Kyle Summers, Cambridge	Theater B
6:30 p.m. – 6:50 p.m.	**Behind the Curtain: The CAAP®[1] Service Difference,** Audrey Hixson, Cambridge	Theater C
6:30 p.m. – 6:50 p.m.	**Continuity Planning for the Future: Protecting Clients, Family, and Business,** Siara Smith, Cambridge	Theater D
7:00 p.m. – 7:20 p.m.	**Access to Capital: The Key to Opportunity,** U.S. Bank	Theater A
7:00 p.m. – 7:20 p.m.	**An Intelligently Personalized Approach: Engaging HNW Clients Using RBC Rochdale's Galaxy System,** RBC Rochdale	Theater B
7:00 p.m. – 7:20 p.m.	**Portfolio Gains, Not Tax Pain: Smarter Solutions for High-Net-Worth Clients,**Horizon	Theater C

7:00 p.m. – 7:20 p.m.	**The Institutional Strategy That's Quietly Delivering Double-Digit Yields,** Eagle Point Credit	Theater D
7:30 p.m. – 7:50 p.m.	**How Peers Use Spire Outsourcing for Financial Planning,** Eric Sawyer, Spire Outsourcing	Theater A
7:30 p.m. – 7:50 p.m.	**Firelight in Action: Making Annuity Business Easier from Start to Finish,** Casey Psyk, Cambridge	Theater B
7:30 p.m. – 7:50 p.m.	**Eight Strategic Imperatives: A Playbook for Generational Wealth Conversations,** Chad George, Cambridge	Theater C
7:30 p.m. – 7:50 p.m.	**All Things Indy: Your AI Guide to "The Cambridge Way",** Amanda Reineke, Cambridge	Theater D
8:00 p.m. – 8:20 p.m.	**Interval Funds: Liquidity Is a Requirement, Not a Choice,** Cantor Fitzgerald Asset Management	Theater A
8:00 p.m. – 8:20 p.m.	**Business Owner Exit Planning Blueprint,** Principal Asset Management	Theater B
8:00 p.m. – 8:20 p.m.	**Disciplined Approach to Capital Investing: Focus on Yield and Growth,** Waveland Energy	Theater C
8:00 p.m. – 8:20 p.m.	**Research and Build Portfolios with Franklin Templeton's Open Architecture Tool,** Franklin Templeton	Theater D
8:30 p.m. – 8:50 p.m.	**RegEd: Compliance System Tips and Tricks,** Alexis Schumann, Cambridge	Theater A
8:30 p.m. – 8:50 p.m.	**Why CFP® Certification Matters: Driving Growth and Client Outcomes,** Kaplan	Theater B
8:30 p.m. – 8:50 p.m.	**Customer-Centric Excellence: Processes That Drive Loyalty and Results,** Tonya Kisling, Cambridge	Theater C
8:30 p.m. – 8:50 p.m.	**Docusign Power Moves: Advanced Features You'll Actually Use,** Roseann Johnson, Cambridge	Theater D
9:00 p.m. – 9:20 p.m.	**Follow the Money: Turning Complexity into Client Clarity,** Voyant	Theater A
9:00 p.m. – 9:20 p.m.	**Investing in late-Stage Private Growth and Innovation Companies,** Liberty Street Advisors	Theater B
9:00 p.m. – 9:20 p.m.	**Orion's Connected Intelligence: From Data Strategy to Actionable Outcomes,** Orion	Theater C
9:00 p.m. – 9:20 p.m.	**The End of the Generalist Financial Professional,** Snappy Kraken	Theater D
Thursday, September 17		
Time	**Session**	**Location**
7:00 a.m. – 7:00 p.m.	**Registration and Information Desk Open**	City Hall Lobby
7:00 a.m. – noon	**Professional Headshot Hours**	Destin 1-2
7:00 a.m. – 7:00 p.m.	**Expo Hall Hours**	Florida Exhibition Hall D-F
7:00 a.m. – 8:15 a.m.	*Networking Breakfast*	*Florida Exhibition Hall D-F*
7:00 a.m. – 8:15 a.m.	*Prayer Breakfast*	*204*
7:00 a.m. – 8:15 a.m.	**ACM + AML** *(Must be present for entire session to receive credit)* **,** Andrew Bowers, Cambridge	201
7:00 a.m. – 8:15 a.m.	**ACM for Administrative Support Staff,** Steve Youhn, Cambridge	202
7:00 a.m. – 7:20 a.m.	**Private Credit Isn't All the Same: Unlocking Value with Real Estate-Backed Lending,** Peachtree Group	Theater A

7:00 a.m. – 7:20 a.m.	**See the Advantage,** Transamerica	Theater B
7:00 a.m. – 7:20 a.m.	**The Long/Short Tax Alpha Revolution: Solving Investor Challenges,** Symmetry Partners	Theater C
7:00 a.m. – 7:20 a.m.	**Private Markets in Focus: Opportunities Across Credit, Equity, Infrastructure, and Venture Capital,** StepStone	Theater D
7:30 a.m. – 7:50 a.m.	**Scaling Your Practice with Simplicity: Solutions That Drive Growth,** Simplicity Group	Theater A
7:30 a.m. – 7:50 a.m.	**Proactive Planning with AI: Unlocking Opportunities Across Your Book,** Vanilla	Theater B
7:30 a.m. – 7:50 a.m.	**Equity Models Using Zacks Financial Professional Tools and Behavioral Bias in Portfolios,** Zacks	Theater C
7:30 a.m. – 7:50 a.m.	**From Property Problems to Passive Income: 1031 Exchange Strategies Using DSTs,** Sealy Investment Securities	Theater D
8:00 a.m. – 8:20 a.m.	**Shaping the Financial Regulatory Landscape: Insights from a 41-year Industry Advocate,** Allianz	Theater A
8:00 a.m. – 8:20 a.m.	**Modern Income and Growth Strategies Using RILA,** Principal Annuities	Theater B
8:00 a.m. – 8:20 a.m.	**Strategies to Help Increase Clients' Guaranteed Lifetime Income,** Prudential	Theater C
8:00 a.m. – 8:20 a.m.	**The Meeting-Ready Financial Professional: How AI Is Transforming Every Step of the Client Experience,** GReminders	Theater D
8:30 a.m. – 10:30 a.m.	**General Session**	Osceola Ballroom
	Jim Guy Memorial Scholarship Winners	
	Invest in Others	
	Cambridge Talk: Growth and Development	
	Economic Update, Brian Wesbury, *sponsored by First Trust*	
10:30 a.m. – 11:00 a.m.	*Networking Break*	*Florida Exhibition Hall D-F*
11:00 a.m. – 11:50 a.m.	*Service Excellence and Technology Advisory Council Meeting (Invite only)*	*Captiva 1-2*
11:00 a.m. – 11:50 a.m.	**Grow the Portfolio, Not the Tax Bill: Smarter Investing for High-Net-Worth Clients,**Horizon	201
11:00 a.m. – 11:50 a.m.	**Behind the Markets: What Powers ETF Innovation,** Howard Capital	202
11:00 a.m. – 11:50 a.m.	**Beyond the Headlines: What Matters Most in Today's Credit Markets,** Eagle Point Credit	216
11:00 a.m. – 11:50 a.m.	**From Search to Client: A Smarter Digital Marketing Approach,** CION Investments	212
11:00 a.m. – 11:50 a.m.	**Understanding Social Security: What Today's Benefits Mean for Retirement Planning,** Protective	215
11:00 a.m. – 11:50 a.m.	**Medicare: What You Need to Know When Your Clients Ask for Help,** Nationwide	211
11:00 a.m. – 11:50 a.m.	**Washington D.C. Update: Planning Opportunities with OBBBA, SECURE 2.0, and More,** Principal Asset Management	203

11:00 a.m. – 11:50 a.m.	**Capital Markets Outlook: A Forward-Looking Perspective for Financial Professionals,** Fidelity	204
11:00 a.m. – 11:50 a.m.	**Your Hidden Superpowers of Confidence and Credibility,** Voya Financial	214
11:00 a.m. – 11:50 a.m.	**A Comprehensive Guide to Navigating Roth Conversions,** Athene	213
11:00 a.m. – 11:50 a.m.	**10 Actionable Tax Strategies for the Current Tax Environment: Considerations for 2026,** Prudential	107
11:00 a.m. – 11:50 a.m.	**Digital Assets: The Dawn of a New Asset Class,** Franklin Templeton	104
11:00 a.m. – 11:50 a.m.	**Building a High-Performing Team: Maximize the Return on Your People,** SEI	105
11:00 a.m. – 11:50 a.m.	**Enhancing Portfolio Resilience in Volatile Markets,** Ocean Park Asset Management	106
11:00 a.m. – 11:50 a.m.	**Preparing Clients for What's Next: A Guide to Your Role in Exit Planning,** CNL Securities	102
11:00 a.m. – 11:50 a.m.	**When Intelligence Isn't Enough: The Behavioral Side of Investing,** Sammons Group	101
11:00 a.m. – 11:50 a.m.	**Future-Proof Your Practice: A Blueprint for Growth, Legacy, and Loyalty,** Jackson	209
11:00 a.m. – 11:50 a.m.	**The Power of Free Cash Flow,** Pacer ETFs	210
11:00 a.m. – 11:50 a.m.	**The Rate Cut Fantasy: Hope vs. Reality in an Inflationary World,** SWBC	208
11:00 a.m. – 11:50 a.m.	**Investing in Energy: Opportunities and Tax Efficiency,** U.S. Energy	207
11:00 a.m. – 11:50 a.m.	**Optimizing Outcomes: Client Goals and the Evolution of RILA Portfolio Design,** Brighthouse Financial	103
11:00 a.m. – 11:50 a.m.	**Advanced Wealth Strategies: Leveraging Direct Indexing for Alpha and Tax Efficiency,** Orion	206
11:00 a.m. – 11:20 a.m.	**Active Living and Multifamily Strategies with Section 1031 Exchanges,** Capital Square	Theater A
11:00 a.m. – 11:20 a.m.	**Advanced Planning Opportunity: Multigenerational Tax Deferral,** Equitable	Theater B
11:00 a.m. – 11:20 a.m.	**Driving Organic Growth with Zocks: Turning Conversations into Opportunity,** Zocks	Theater C
11:00 a.m. – 11:20 a.m.	**Client 4 Life: Work Smarter, Sell More, Achieve a Balanced Lifestyle,** Client 4 Life Management System	Theater D
11:30 a.m. – 11:50 a.m.	**The Future of Wealth Management Is Personal,** Russell Investments	Theater A
11:30 a.m. – 11:50 a.m.	**One Firm, Multiple Outcomes: Upside Participation, Risk Mitigation & Income,** Calamos	Theater B
11:30 a.m. – 11:50 a.m.	**Optimizing Private Credit: Where Strategy Meets Manager Edge,** T. Rowe Price	Theater C
11:30 a.m. – 11:50 a.m.	**The AI-Native CRM for Financial Professionals,** Slant	Theater D
Noon – 1:15 p.m.	*Networking Lunch*	*Florida Exhibition Hall D-F*
Noon – 1:00 p.m.	**Sharing in Success Lunch: Peer Insights. Real Results. Shared Success.** *(Invite only)*	207
Noon – 1:00 p.m.	*Black Advisor Group Lunch*	*206*
Noon – 1:00 p.m.	*New Century Council Lunch (Invite only)*	*Captiva 1-2*
Noon – 12:20 p.m.	**Personalization Made Easy with SEI's Investment Lineup,** SEI	Theater A

Noon – 12:20 p.m.	**Annuities Are Meant to Be Spent,** Lincoln Financial	Theater B
Noon – 12:20 p.m.	**Get Found (Not Filtered Out): Online Reviews, AI Search, and Your Growth Edge,** Wealthtender	Theater C
Noon – 12:20 p.m.	**Making Your Story STICK,** Frontier Asset Management	Theater D
Noon – 12:20 p.m.	**Tax-Efficient Growth: The New Standard in Wealth Management,** AssetMark	101
Noon – 12:20 p.m.	**From Defense to Offense: Finding Opportunity in Multifamily's Reset,** Cottonwood Communities	102
Noon – 12:20 p.m.	**Sleep Well, Stay Invested: The Financial Professional's Playbook for Winning Clients with Buffer ETFs,** Innovator	105
Noon – 12:20 p.m.	**Betterment Overview,** Betterment Advisor Solutions	104
12:30 p.m. – 12:50 p.m.	**The 1031 Advantage: Win Clients, Keep Them Longer,** Bluerock	Theater A
12:30 p.m. – 12:50 p.m.	**The Ins and Outs of Private Equity,** CNL Securities	Theater B
12:30 p.m. – 12:50 p.m.	**From Estate Planning to Practice Growth: How Real Attorneys Power Modern Digital Estate Solutions,** Estate Guru	Theater C
12:30 p.m. – 12:50 p.m.	**Turning Ultra-High-Net-Worth Clients and Prospects into Raving Fans,** Independent Trust Company	Theater D
12:30 p.m. – 12:50 p.m.	**The Evolving World of Advisory Annuities,** Pacific Life Insurance Company	101
12:30 p.m. – 12:50 p.m.	**Opportunity in High Yield Municipals: Income, Alpha, and Portfolio Flexibility,** Lord Abbett	105
12:30 p.m. – 12:50 p.m.	**KEEP by StoneCastle: Turning Cash into a Strategic Advantage,** KEEP by StoneCastle	104
1:00 p.m. – 1:20 p.m.	**Opportunity in High Yield Municipals: Income, Alpha, and Portfolio Flexibility,** Lord Abbett	Theater A
1:00 p.m. – 1:20 p.m.	**Transforming Spending Into Income: The Rise of Royalty Investing,** Lincoln Financial	Theater B
1:00 p.m. – 1:20 p.m.	**SDBA of the Future: TPFG's Best-In-Class Tech Stack Supporting AUM Growth,** The Pacific Financial Group	Theater C
1:00 p.m. – 1:20 p.m.	**Helping Clients Plan for the Next Phase of Family Wealth,** BNY	Theater D
1:00 p.m. – 1:20 p.m.	**Future Ready: The Pacer AI 3-Pack,** Pacer ETFs	101
1:00 p.m. – 1:20 p.m.	**Capture, Retain, Grow: Connecting Retirement, Investments, and IRAs to Drive Growth,** Voya Financial	102
1:00 p.m. – 1:20 p.m.	**Multigenerational Planning Strategies for Growing and Passing Wealth,** Jackson	105
1:00 p.m. – 1:20 p.m.	**Public vs. Private Divide: Understanding Due Diligence for Private Market Assets,** CION Investments	104
1:00 p.m. – 1:20 p.m.	**The Power of Multi-Asset Investing,** 3EDGE	103
1:00 p.m. – 5:00 p.m.	**Professional Headshot Hours**	Destin 1-2
1:30 p.m. – 2:20 p.m.	**AI Success Stories: How Financial Professionals Use AI in Their Offices,** Brooke Ramos Fritz, Cambridge	201

1:30 p.m. – 2:20 p.m.	**Strategic Centers of Influence: Designing Referral Partnerships That Drive Growth,** Ali Den Hartog, Cambridge	202
1:30 p.m. – 2:20 p.m.	**Doing It All—Without Doing Too Much: Secrets of Successful Solo Businesses,** Kristen Civin, Cambridge	216
1:30 p.m. – 2:20 p.m.	**What High-Net-Worth Clients Really Need: Coordination, Clarity, and Control,**Janey Kegley, Cambridge	212
1:30 p.m. – 2:20 p.m.	**Operational Efficiency That Fuels Growth: A Source Panel**, Krystal Bass, Cambridge	215
1:30 p.m. – 2:20 p.m.	**The Human Side of Planning: Navigating Addiction, Mental Health, Disability, and Family Wealth,** Bill Robertson, Cambridge	211
1:30 p.m. – 2:20 p.m.	**Peer Roundtables: Financial Planning in Practice,** Eric Sawyer, Spire Outsouring	203
1:30 p.m. – 2:20 p.m.	**Planning Across Generations: Aligning Families, Expectations, and Wealth,** Joey Hodgins, Cambridge	204
1:30 p.m. – 2:20 p.m.	**Fraud and Financial Crime: Risks, Red Flags, and Real-World Responses,** Rick Kuhlman, Cambridge	214
1:30 p.m. – 2:20 p.m.	**Cybersecurity Trends That Matter for Everyone,** Cameron Chamberlin, Cambridge	213
1:30 p.m. – 2:20 p.m.	**Many Paths to Succession,** Bud Montang, Cambridge	107
1:30 p.m. – 2:20 p.m.	**Designing the Client Journey: Turning Service into a Retention Advantage,** Tonya Kisling, Cambridge	104
1:30 p.m. – 2:20 p.m.	**CIRStatements Enhanced by Wove 101,** Denver Carlson, Cambridge	105
1:30 p.m. – 2:20 p.m.	**Data-Driven Decisions for Financial Professionals,** Stephanie Newcomb, Cambridge	106
1:30 p.m. – 2:20 p.m.	**The Power of Philanthropy in High-Net-Worth Financial Planning,**Heather Becklund, Cambridge	102
1:30 p.m. – 2:20 p.m.	**Essentials of Pro Bono Financial Planning,** Foundation for Financial Planning	101
1:30 p.m. – 2:20 p.m.	**WealthPort: Non-Model Trading,** Seth Cecil, Cambridge	209
1:30 p.m. – 2:20 p.m.	**Supervising GenAI with Confidence: Practical Guidance and Real-World Scenarios,** Susan Daugherty, Cambridge	210
1:30 p.m. – 2:20 p.m.	**Cambridge Research and Consulting Capabilities,** Harison Sidhu, Cambridge	208
1:30 p.m. – 2:20 p.m.	**Annuity Book of Business Reviews: From Process to Portfolio Impact,** Casey Psyk, Cambridge	207
1:30 p.m. – 1:50 p.m.	**Scaling Smarter with Cambridge Source: Revised Services for Growth and Efficiency,** Ian Bee, Cambridge	Theater A
1:30 p.m. – 1:50 p.m.	**Righbridge Explained: Supporting Confident Annuity Recommendations,** Kyle Summers, Cambridge	Theater B
1:30 p.m. – 1:50 p.m.	**Behind the Curtain: The CAAP Service Difference,** Audrey Hixson, Cambridge	Theater C

1:30 p.m. – 1:50 p.m.	**RegEd: Compliance System Tips and Tricks,** Alexis Schumann, Cambridge	Theater D
2:00 p.m. – 2:20 p.m.	**All Things Indy: Your AI Guide to "The Cambridge Way",** Amanda Reineke, Cambridge	Theater A
2:00 p.m. – 2:20 p.m.	**Continuity Planning for the Future: Protecting Clients, Family, and Business,** Siara Smith, Cambridge	Theater B
2:00 p.m. – 2:20 p.m.	**Docusign Power Moves: Advanced Features You'll Actually Use,** Roseann Johnson, Cambridge	Theater C
2:30 p.m. – 3:20 p.m.	*Cambridge Ambassadors Advisory Council Social Hour (Invite only)*	*Captiva 1-2*
2:30 p.m. – 3:20 p.m.	**AI in Practice: Where to Start, What to Measure, and What's Working,** Zocks	201
2:30 p.m. – 3:20 p.m.	**Advanced Social Security Strategies: Navigating Complex Benefit Scenarios,** Equitable	202
2:30 p.m. – 3:20 p.m.	**Washington Update: What's Happening Now and What It May Mean for Mid-Terms,** Principal Annuities	216
2:30 p.m. – 3:20 p.m.	**Orlando's Outlook: Markets, Politics, and the Road Ahead,** Federated Hermes	212
2:30 p.m. – 3:20 p.m.	**The World on Fire: Finding Opportunity in Geopolitical Shockwaves,** WisdomTree	215
2:30 p.m. – 3:20 p.m.	**Markets, Power, and Uncertainty in a Changing Global Order,** Allianz	211
2:30 p.m. – 3:20 p.m.	**Understanding Client Psychology for Better Outcomes,** Maple Capital Management	203
2:30 p.m. – 3:20 p.m.	**Tax Elimination Strategies Through Real Estate Development and Roth Conversions,** Capital Square	204
2:30 p.m. – 3:20 p.m.	**Succession Planning: Is the Future of Your Firm Protected?,** AssetMark	214
2:30 p.m. – 3:20 p.m.	**From Mindset to Metabolism: A Blueprint for High Performance Living,** Symetra Financial	213
2:30 p.m. – 3:20 p.m.	**Momentum You Can Measure: Unlocking the Power of Advisory Transitions,** Russell Investments	107
2:30 p.m. – 3:20 p.m.	**Marriage and Money: Financial Considerations for Spouses,** Transamerica	104
2:30 p.m. – 3:20 p.m.	**What Clients Look For When They Hire a Financial Professional,** Morningstar Wealth	105
2:30 p.m. – 3:20 p.m.	**Four Boxes. One Market. Unlimited Potential.,** Capital Group | American Funds	106
2:30 p.m. – 3:20 p.m.	**Pooled Employer Plans: Opportunity, Obligation, or Both,** Ameritas	102
2:30 p.m. – 3:20 p.m.	**Unlocking Tax-Deferred Wealth: A Guide to 1031, 1033, and 721 DST Exchanges,** Bluerock	101
2:30 p.m. – 3:20 p.m.	**Diversification and Tax Efficiency with REITs and Alternatives,** Cottonwood Communities	209
2:30 p.m. – 3:20 p.m.	**Beyond the Hype: Today's Alternative Investments,** Envestnet Asset Management	210
2:30 p.m. – 3:20 p.m.	**Hedged Equity & Autocallables: Upside Participation, Risk Mitigation & Income,** Calamos	208
2:30 p.m. – 3:20 p.m.	**The Long/Short Tax Alpha Revolution: Solving Complex Tax Challenges,** Symmetry Partners	207
2:30 p.m. – 3:20 p.m.	**The Concentration Paradox: When Your Greatest Asset Becomes Your Greatest Risk,** RBC Rochdale	103

2:30 p.m. – 3:20 p.m.	**Portfolio Construction and Private Markets: Where to Go Now for Diversification,** Inland Real Estate Investment Corporation	206
2:30 p.m. – 2:50 p.m.	**Use of Annuities in Trusts,** Brighthouse Financial	Theater A
2:30 p.m. – 2:50 p.m.	**The Power of Leading with Advice During Moments That Matter,** Bento Engine	Theater B
2:30 p.m. – 2:50 p.m.	**The Financial Professional's Guide to Fixing the Broken Estate Planning Experience,** EncorEstate Plans	Theater C
2:30 p.m. – 2:50 p.m.	**Optimizing Client Management: Taking Your CRM to the Next Level,** Wealthbox	Theater D
3:00 p.m. – 3:20 p.m.	**Liquid Alternatives: Building Income and Portfolio Strength,** Simplify	Theater A
3:00 p.m. – 3:20 p.m.	**Wisdom Tree Overview,** WisdomTree	Theater B
3:00 p.m. – 3:20 p.m.	**Lifetime Paychecks: Blending Social Security with Guaranteed Income,** Protective	Theater C
3:00 p.m. – 3:20 p.m.	**Stop Explaining, Start Engaging: Converting Public Employees into Clients,** RetireReady Solutions	Theater D
3:30 p.m. – 4:00 p.m.	*Networking Break*	*Florida Exhibition Hall D-F*
4:00 p.m. – 6:15 p.m.	**General Session**	Osceola Ballroom
	Cambridge Talk: Building Momentum with Innovation and Experience	
	Cambridge Xchange | Hear From Your Peers	
	Make a Difference Home Office Winners 2026	
6:15 p.m. – 7:00 p.m.	*Happy Hour Reception (Guests welcome)*	*Florida Exhibition Hall D-F*
6:30 p.m. – 6:50 p.m.	**Turning Market Noise Into Meaningful Conversations,** F&G Life	Theater A
6:30 p.m. – 6:50 p.m.	**Guaranteed Income Solutions: Evaluating Strategies and Identifying Opportunities,** Global Atlantic	Theater B
6:30 p.m. – 6:50 p.m.	**Legacy Planning: Inherited Wealth Transfer and Control,** Mass Mutual Ascend	Theater C
6:30 p.m. – 6:50 p.m.	**Mining for Goals: Behavioral Nudges to Help Reveal What Truly Matters,** Morningstar Wealth	Theater D
	Sponsor Dinearounds (Optional: Visit respective sponsor booths for more information)	
Friday, September 18		
Time	**Session**	**Location**
6:00 a.m. – 7:30 a.m.	**Charity 5K Fun Run/Walk,** *sponsored by Transamerica (Meet at 5:45)*	Convention Center Bus Loop
7:00 a.m. – 5:30 p.m.	**Registration and Information Desk Open**	City Hall Lobby
7:00 a.m. – noon	**Professional Headshot Hours**	Destin 1-2
7:00 a.m. – 1:30 p.m.	**Expo Hall Hours**	Florida Exhibition Hall D-F
7:00 a.m. – 8:15 a.m.	*Networking Breakfast*	*Florida Exhibition Hall D-F*
7:00 a.m. – 8:00 a.m.	*Admin-to-Admin Community Breakfast: What High -Functioning Admins Do Differently*	204
7:00 a.m. – 8:00 a.m.	*Social and Sustainable Investing Community Breakfast*	206

7:00 a.m. – 8:00 a.m.	*Faith-based Investing Advisory Council Breakfast (Invite only)*	Captiva 1-2
7:00 a.m. – 7:20 a.m.	**Service Over Sales: Using Third-Party Managers to Deliver More Client Value,** Maple Capital Management	Theater A
7:00 a.m. – 7:20 a.m.	**Balancing Rate and Duration: Avoiding the Short-Term Trap in Annuities,** United LIfe	Theater B
7:00 a.m. – 7:20 a.m.	**The Efficient Financial Professional: Less Busywork Behind Every Meeting,** YCharts	Theater C
7:00 a.m. – 7:20 a.m.	**AI Powered Financial Professional: Becoming a Jump Power User, Best Practices and New Capabilities,** Jump	Theater D
7:30 a.m. – 7:50 a.m.	**The Contingent Deferred Annuity and CAAP : An Innovative New Offering at Cambridge,** Sammons Group	Theater A
7:30 a.m. – 7:50 a.m.	**Options and Derivative Income Strategies: Covered Call Approaches in Practice,** GlobalX ETFs	Theater B
7:30 a.m. – 7:50 a.m.	**The New Rules of Financial Professional Marketing: Quick Wins for 2026,** FMG Suite	Theater C
7:30 a.m. – 7:50 a.m.	**Buffered ETF Models on CAAP: Managing Volatility While Staying Invested,** First Trust	Theater D
8:00 a.m. – 8:20 a.m.	**Protecting Independence in a Changing Regulatory Landscape,** Financial Services Institute	Theater A
8:00 a.m. – 8:20 a.m.	**Client Protection and Lead Generation Through Annuity Solutions,** Corebridge Financial	Theater B
8:00 a.m. – 8:20 a.m.	**New Paths for Better Outcomes: Partner Solutions That Elevate Your Business,** BPAS Partner Solutions	Theater C
8:00 a.m. – 8:20 a.m.	**Don't Drive While Looking in the Rearview Mirror,** Ocean Park Asset Management	Theater D
8:30 a.m. – 10:15 a.m.	**General Session** **Cambridge Talk: Advocacy & Administration** **Advocacy Update With FSI,** Dale Brown	Osceola Ballroom
10:15 a.m. – 11:00 a.m.	*Networking Break*	*Florida Exhibition Hall D-F*
11:00 a.m. – 11:50 a.m.	*Compliance Advisory Council (Invite only)*	*Captiva 1-2*
11:00 a.m. – 11:50 a.m.	**Client Conversations: Planning for Healthcare in Retirement,** Pacific Life Insurance Company	201
11:00 a.m. – 11:50 a.m.	**Intelligent Growth Through AI: What Drives the Strongest Financial Professional Practices,** TruChoice Financial Group	202
11:00 a.m. – 11:50 a.m.	**Inside the Mind of Elite Financial Professionals: Why The Best Think Differently,** F&G Life	216
11:00 a.m. – 11:50 a.m.	**Winning High-Net-Worth Clients Through Growth Mindset and Experience,**First Eagle	212
11:00 a.m. – 11:50 a.m.	**Live Events That Work: Best Practices, Checklists, and ROI-Driven Strategies,** Advisors Excel	215
11:00 a.m. – 11:50 a.m.	**Navigating Long-Term Care Planning: Challenges, Opportunities and Modern Advice,** Ash Brokerage	211
11:00 a.m. – 11:50 a.m.	**State of the AI Bull Market,** Innovator	203

11:00 a.m. – 11:50 a.m.	**The New Face of Wealth: Emerging Trends in the Financial Industry,** Lincoln Financial	204
11:00 a.m. – 11:50 a.m.	**The Many Faces and Facets of Behavioral Finance,** Advisors Asset Management	214
11:00 a.m. – 11:50 a.m.	**Becoming Superhuman: The Science of Putting Purpose Behind Money,** Corebridge Financial	213
11:00 a.m. – 11:50 a.m.	**Advanced Planning Strategies for Business Owners,** Simplicity Group	107
11:00 a.m. – 11:50 a.m.	**Modern Teaming: Unlock a Better Version of Your Practice,** T. Rowe Price	104
11:00 a.m. – 11:50 a.m.	**Wealth Alliance: Partnering for Your Success,** BNY	105
11:00 a.m. – 11:50 a.m.	**The Power of Multi-Asset Investing,** 3EDGE	106
11:00 a.m. – 11:50 a.m.	**Supercharge Your Practice with Model Portfolios,** Invesco	102
11:00 a.m. – 11:50 a.m.	**Alternatives: From Edge Case to Essential in Modern Portfolios,** Simplify	101
11:00 a.m. – 11:50 a.m.	**Rethinking Deferred Annuities: Powerful Strategies for Legacy Planning,** Mass Mutual Ascend	209
11:00 a.m. – 11:50 a.m.	**Roth Conversions and DSTs: Advanced Tax Strategies that Separate Elite Financial Professionals,** PeachTree Group	210
11:00 a.m. – 11:50 a.m.	**SDBA of the Future: TPFG's Best-In-Class Tech Stack Supporting AUM Growth,** The Pacific Financial Group	208
11:00 a.m. – 11:50 a.m.	**Diversity, Defend, Deliver: Navigating Interest Rate Strategies,** SWBC	207
11:00 a.m. – 11:50 a.m.	**Megatrends Shaping the Future of Wealth and Investing,** Sealy Investment Securities	103
11:00 a.m. – 11:20 a.m.	**Nonqualified Annuity Stretch Strategy,** Nationwide	Theater A
11:00 a.m. – 11:20 a.m.	**Turn a Tax Bill into Tax-Free Income for Life,** Eagle Life Insurance Company	Theater B
11:00 a.m. – 11:20 a.m.	**Personalized Wealth Management at Scale,** Envestnet Asset Management	Theater C
11:00 a.m. – 11:20 a.m.	**How to Sell Fee-Based Investment Management,** Mariner	Theater D
11:30 a.m. – 11:50 a.m.	**The Impact of AI and Quant Investing,** Federated Hermes	Theater A
11:30 a.m. – 11:50 a.m.	**Using Public Data to Prospect the Business Owner,** Ameritas	Theater B
11:30 a.m. – 11:50 a.m.	**$5 Trillion in Motion: The Pre-Rollover Asset Capture Opportunity,** Flexible Plan	Theater C
11:30 a.m. – 11:50 a.m.	**Winning Business Owners: The Largest Planning Opportunity Today,** BizEquity	Theater D
Noon – 1:15 p.m.	*Networking Lunch*	*Florida Exhibition Hall D-F*
Noon – 1:15 p.m.	**ACM + AML** *(Must be present for entire session to receive credit),* Andrew Bowers, Cambridge	201
Noon – 1:00 p.m.	*Cambridge Community of Women Lunch*	*202*
Noon – 1:00 p.m.	*Retirement Plan Partners Group Lunch (Invite only)*	*206*
Noon – 1:00 p.m.	*Financial Planning Advisory Council Lunch (Invite only)*	*Captiva 1-2*
Noon – 12:20 p.m.	**Crump Insurance Services: Top Solutions to Support Financial Professionals,** Crump Life Insurance Services	Theater A

Noon – 12:20 p.m.	**Buy Fear, Sell Greed: Positioning for What's Next,** Dunham and Associates	Theater B
Noon – 12:20 p.m.	**Uncovering a Hidden Asset-Gathering Opportunity,** Howard Capital	Theater C
Noon – 12:20 p.m.	**Zone Choice Advantage and Zone Choice Income: Accumulation and Income Solutions,** TruStage	Theater D
Noon – 12:20 p.m.	**Energy Investing Today: Market Trends and Tax Planning Strategies,** U.S. Energy	101
Noon – 12:20 p.m.	**Marketing That Helps You Transform Your Practice,** TruChoice Financial Group	102
Noon – 12:20 p.m.	**First Eagle High Yield Municipal Fund: Philosophy and Overview,** First Eagle	105
12:30 p.m. – 12:50 p.m.	**How Peers Use Spire Outsourcing for Financial Planning,** Eric Sawyer, Spire Outsourcing	Theater A
12:30 p.m. – 12:50 p.m.	**Firelight in Action: Making Annuity Business Easier from Start to Finish,** Casey Psyk, Cambridge	Theater B
12:30 p.m. – 12:50 p.m.	**Eight Strategic Imperatives: A Playbook for Generational Wealth Conversations,** Chad George, Cambridge	Theater C
12:30 p.m. – 12:50 p.m.	**Customer-Centric Excellence: Processes That Drive Loyalty and Results,** Tonya Kisling, Cambridge	Theater D
1:00 p.m. – 1:20 p.m.	**Back to the Future: Where Portfolios Can Generate Income,** Advisors Asset Management	Theater A
1:00 p.m. – 1:20 p.m.	**AI Playbook: Practical and Compliant Use Cases You Can Trust,** Advisors Excel	Theater B
1:00 p.m. – 1:20 p.m.	**Bulletproof Your Business,** Ash Brokerage	Theater C
1:00 p.m. – 1:20 p.m.	**The Case for Active ETFs: Top Fidelity ETF Ideas for 2026,** Fidelity	Theater D
1:00 p.m. – 1:20 p.m.	**A Demographic-Driven Real Estate Strategy: Self-Storage, Healthcare, and Student Housing,** Inland Real Estate Investment Corporation	101
1:00 p.m. – 1:20 p.m.	**WealthPort: BlackRock Global Allocation (GA) Selects – Access a World of Opportunity,** BlackRock	102
1:00 p.m. – 1:20 p.m.	**Creating Catalyst Moments: How AI Helps Financial Professionals Win Prospects and Keep Clients,** Nitrogen Wealth	105
1:00 p.m. – 1:20 p.m.	**Don't Wait for the Rollover,** Advisors Capital Management	104
1:30 p.m. – 2:20 p.m.	**Panel: Rethinking Succession: What the Next Generation Wants You to Hear,** Kristen Civin, Cambridge	201
1:30 p.m. – 2:20 p.m.	**Panel: Paths to Success: Lessons from Distinct Business Models,** Matt Guba, Cambridge	202
1:30 p.m. – 2:20 p.m.	**Panel: Inside Successful Ensembles: What Works, What Doesn't, and What To Do Differently,** Ali Den Hartog, Cambridge	216
1:30 p.m. – 2:20 p.m.	**Panel: Private Credit and Public Fixed Income: Portfolio Roles and Tradeoffs,** Ashish Phansopkar, Cambridge	212

1:30 p.m. – 2:20 p.m.	**Panel: Deliver Customizable Planning by Leveraging Spire Outsourcing and Cambridge,** Eric Sawyer, Spire Outsourcing	215
1:30 p.m. – 2:20 p.m.	**Building Durable High-Net-Worth Relationships Through Intentional Client Experience,** Joey Hodgins, Cambridge	211
1:30 p.m. – 2:20 p.m.	**Panel: The Pro Bono Edge: Sharpening Your Advisory Skills While Giving Back,** Foundation for Financial Planning	203
1:30 p.m. – 2:20 p.m.	**Everyday Productivity with AI: 30-Day Wins Using AI as a Partner,** Brooke Ramos Fritz, Cambridge	204
1:30 p.m. – 2:20 p.m.	**Good, Better, Best: A Practical Guide to Technology Integration**, Quenton Dodson, Cambridge	214
1:30 p.m. – 2:20 p.m.	**Identifying, Recruiting and Compensating the Next Gen Advisor,** Kris Emick and Matt Goodwin, Cambridge	213
1:30 p.m. – 2:20 p.m.	**Closing the Gap: What Clients Want Versus What They Receive in Financial Planning,** Heather Becklund, Cambridge	107
1:30 p.m. – 2:20 p.m.	**Compliance Inner Workings: Audit, Advertising, and OBAs,** Alexis Schumann, Cambridge	104
1:30 p.m. – 2:20 p.m.	**CIRStatements Enhanced by Wove 201,** Denver Carlson, Cambridge	105
1:30 p.m. – 2:20 p.m.	**Digital Access and Account Visibility: Registration, Login Support, and Linking,** Roseann Johnson, Cambridge	106
1:30 p.m. – 2:20 p.m.	**Before You Hire: Preparing Your Business for a Junior Financial Professional,** Stephanie Little, Cambridge	102
1:30 p.m. – 2:20 p.m.	**Introducing Contingent Deferred Annuities: An Insurance Overlay for CAAP,** Tyler Miller, Cambridge	101
1:30 p.m. – 2:20 p.m.	**WealthPort: Model Management & Rebalancing,** Seth Cecil, Cambridge	209
1:30 p.m. – 2:20 p.m.	**Supervisor Lab: Firelight and Document Supervision,** Kyle Summers, Cambridge	210
1:30 p.m. – 2:20 p.m.	**Cash Balance Plans and 401(k) Strategies for High-Income Business Owners,** Bill Robertson, Cambridge	208
2:30 p.m. – 3:20 p.m.	**LinkedIn® for Business Results,** Meeder Investment Management	201
2:30 p.m. – 3:20 p.m.	*CAAP Advisory Council Meeting (Invite only)*	*Captiva 1-2*
2:30 p.m. – 3:20 p.m.	**Acting on the Acts: New Opportunities in Recent Legislation,** TruStage	216
2:30 p.m. – 3:20 p.m.	**Today's Markets: Where We've Been and Where We Are Now,** Advisors Capital Management	212
2:30 p.m. – 3:20 p.m.	**The Changing Landscape of IRA Strategies,** Eagle Life Insurance Company	215
2:30 p.m. – 3:20 p.m.	**Ahead of Time: Capitalize on the Quiet Rise of Gen X Wealth,** Global Atlantic	211
2:30 p.m. – 3:20 p.m.	**The Brady Bunch Revisited: Planning for Today's Complex Families,** Dunham and Associates	203

2:30 p.m. – 3:20 p.m.	**Bridging the Behavior Gap in an Uncertain World,** Flexible Plan	204
2:30 p.m. – 3:20 p.m.	**Enhancing the Client Experience Through Better Conversations,** Mariner	214
2:30 p.m. – 3:20 p.m.	**Helping Clients Navigate Long-Term Care: What's Working and Why,** Crump Life Insurance Services	213
2:30 p.m. – 3:20 p.m.	**Key Planning Strategies for Business Owner Clients,** PIMCO	107
2:30 p.m. – 3:20 p.m.	**Infrastructure as a Core Allocation in a New Macro Regime,** Cantor Fitzgerald Asset Management	105
2:30 p.m. – 3:20 p.m.	**Public vs. Private Energy Investing: Opportunities, Risks, and Portfolio Applications,** Waveland Energy	106
2:30 p.m. – 3:20 p.m.	**Structural Themes and Commodities Shaping Today's Portfolios,** GlobalX ETFs	102
2:30 p.m. – 3:20 p.m.	**Stop Trading Growth for Income: the Active ETF Playbook,** Kurv	209
3:30 p.m. – 5:30 p.m.	**General Session with Refreshments**	Osceola Ballroom
	Innovating Without Compromising Trust, Theresa Payton	
	Charity Check Presentation	
	Closing Remarks	
7:30 p.m. – 11:30 p.m.	*Closing Dinner and Reception (Guests welcome)*	*Universal Orlando Resort*

Agenda is subject to change.

Agenda updated as of 8/26/2026.

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