



ADVISORCON 2025 AGENDA

Little Things > Big Results | San Juan, Puerto Rico

01.23.25 | 01.24.25

7:00 AM | Breakfast, Check In, & Mingle

Start your day at AdvisorCon by joining us for breakfast—arrive early to reconnect with old friends, meet new ones, and spark career-long connections over great conversations and shared insights.

**9:00 AM | Welcome & Technology Update**

Incorporating Modern Technology into Your Business
Frantz Widmaier

10:00 AM | 30-Minute Break

Join us for a brief break where you can socialize, network, and make lasting connections with your fellow attendees!

**10:30 AM | Playing the Long Game**

The Little Details That Land the Biggest Clients
Neil McPeak, Jr.

**11:30 AM | Always Be Prospecting**

How to Ensure No Prospect Slips Through the Cracks
Kathy Hobart

12:30 PM | 1-Hour Break for Lunch

Savor a variety of Puerto Rico's tastiest dishes, from classic favorites to exciting new flavors, while you chat with fellow attendees.

**1:30 PM | Leaner, Larger, Better**

Building the Perfect Practice for a HNW Niche
Anasuya Kabad

**2:30 PM | Tweaks & Tune-Ups**

Simple Adjustments That Yield Big Results
David Scott & Nick Kibble

**3:30 PM | How to Clone Yourself**

The Three Major Pillars of a Productive Team
Victor Salinas

5:00 PM | Cocktail Party

Join us for a spread of delicious food and refreshing drinks, where you can socialize, network, and make lasting connections with your fellow attendees!

7:00 AM | Breakfast, Check In, & Mingle

Part of the magic of AdvisorCon is the chance to meet up with old friends or make new ones. We recommend arriving at the conference as early as possible to introduce yourself to the other advisors around you. This will get you started on swapping ideas, sharing observations, and making connections that will last your entire career.

**9:00 AM | Growing As You Change**

How to Grow While Navigating Key Business Transitions

Michael Hudock

10:00 AM | 30-Minute Break

Join us for a brief break where you can socialize, network, and make lasting connections with your fellow attendees!

**10:30 AM | Client Engagement 2.0**

How to Personalize Every Interaction to MAXIMIZE Every Interaction

Brian Uhlinger & Kimberly Gildea

11:30 PM | 1-Hour Break for Lunch

Enjoy one last chance to swap ideas, compare notes, and make future plans with both the speakers and your fellow attendees.

**12:30 AM | Referrals Without Asking**

Small Gestures That Turn Clients into Raving (and Referring) Fans

Rob Messett

**1:30 PM | New Roads, Better Sewers**

The Latest Improvements to the 110% Gorilla Chart

Bill Good

2:30 PM | Adjourn

Make those last-minute connections, then head out to explore all the incredible sights and experiences Puerto Rico has to offer!