



NASHVILLE

★ TENNESSEE ★

5.14.26 - 5.15.26

AGENDA

Day 1 Sessions

May 14, 2026

Thur. • May 14 • 8:30am - 9:00am CT

Check-In & Mingle

We recommend arriving at the conference as early as possible to introduce yourself to the other advisors around you to start swapping ideas, sharing observations, and making connections that will last your entire career.

Thur. • May 14 • 9:00am - 10:00am CT

Agents of AI: Selecting the Right Tool for the Right Job



Frantz Widmaier

Thur. • May 14 • 10:15am - 11:15am CT

HNW Prospecting: The Ultimate Strategy for the Ultimate Niche



David Baker

Thur. • May 14 • 11:15am - 12:00pm CT

Augmented Prospecting: Revamping the Entire “Prospect Experience”



Clare Carberry

Thur. • May 14 • 12:00pm - 1:00pm CT

Break for Lunch

Enjoy some of Nashville's delicious southern cuisine while meeting and mingling with your fellow attendees.

Thur. • May 14 • 1:15pm - 2:15pm CT

Successful Chaos: The Key to Prospecting Business Owners



Bryan Sarff

Thur. • May 14 • 2:15pm - 3:15pm CT

Turn Up the Mic: Building a Virtual Pipeline from Podcasts to Zoom



Paul Kiker

Thur. • May 14 • 3:30pm - 4:30pm CT

Rainmaking 101: Turning Your Successor Into a Superstar Producer



Matt Hicken &
Tony Parmenter

Thur. • May 14 • 5:00pm - 7:00pm CT

Cocktail Party

Join us for delicious food and drinks to socialize and network with your fellow attendees!

Day 2 Sessions

May 15, 2026

Bonus Session (Optional)

Fri. • May 15 • 8:00am - 9:00am CT

Bonus Breakfast Presentation: Force-Multiplying Words



Matthew Bailey & Stephanie Peterson

Fri. • May 15 • 9:00am - 10:00am CT

Break-Throughs & Best Practices: One Advisor's Journey to \$1B in AUM



Scott Ferguson

Fri. • May 15 • 10:15am - 11:15am CT

Systems & SEO: Tools for Being Found, Looking Good, and Growing Faster



Katie Johanssen

Fri. • May 15 • 11:15am - 12:00pm CT

Building a Three-Year Plan: How to Create a Roadmap to the Future You Want



Nick Grady

Fri. • May 15 • 12:00pm - 1:00pm CT

Break for Lunch

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

Fri. • May 15 • 1:00pm - 2:00pm CT

Topic: To Be Announced...



Bill Good

Nashville Awaits!

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