	Monday, February 2 – General Sessions - Salon I-III
8:00	***Firm Succession Planning: Leveraging Partnerships to Optimize Growth -*** *Wealthspire Advisors - Chris DiMeo, Wealthspire Retirement Advisors Jamie Hayes, Fiducient Advisors - Joe Cortese* At a high level, the panel plans to outline several of the paths available to growth-oriented advisors as they scale their practice, including internal succession planning, outsourcing high dollar value functions to focus on highest and best use of time, and partnering with a larger RIA through merger or acquisition. 1 hour of CFP® CE and FL Ins.
8:55	**Medicare and Insurance Updates -** Medicare Plan Options- Joe Santiago Joe Santiago will provide a thorough explanation of the recent changes and limitations effecting Medicare and Insurance plans in 2026. In addition, an overview of all the insurance choices available to a Medicare client. The goal is to provide the Financial Professional with the most current information to assist their clients who are considering retirement and those currently retired and may want or need to make changes to their healthcare plan. 1 hour of CFP® CE and FL Ins.
9:45	**Networking break with Resource Partners**
10:25	***Man and Machine - The Changing Relationship Between Advisors and Their Tech Stack*** *Bento Engine – Philipp Hecker, EncorEstate Plans – Daniel Michelson, Zeplyn AI - Era Jain* During this session advisors will understand why the Kitces Fintech Map keeps on growing and how to optimize their tech stack. We will also address where humans are still best and where tech can help and when to delegate to tech, when to collaborate with tech, and when to be purely human when working with your clients and their portfolios. 1 hour FL Ins., no CFP CE
11:20	***From Outgrown to Outstanding: Tax-Smart Annuity Moves for Today's Market*** *Lincoln Financial - Paul Waldeier* Wherever you reside on the spectrum of buy-in for annuities as a financial planning tool, this session can add value to your practice. We'll focus on 3 Rs of fee-based annuity utilization, repurposing, refinancing and recommending. We'll start by discussing options for helping clients with existing non-qualified annuity positions which they've outgrown by reviewing some tax-forward annuity repurposing strategies. Then we'll cover the factors contributing to the particularly robust annuity marketplace of the moment and outline some annuity refinancing opportunities. Last, we'll conclude by walking through the most common "new money" use-cases for fee-based annuities as a tool to introduce protection to aspects of a client's financial plan. 1 hour of CFP® CE and FL Ins.
12:15	**Lunch with Resource Partners**
1:15	***2026 Economic Outlook - First Trust - Paul Peterson*** During this session Mr. Peterson will provide insight as to where First Trusts Economists sees where the economy, stock market, the Federal Reserve, interest rates, the midterm elections, and where inflation are headed over the next 12 months. Paul will then share where opportunities exist in the market place and how to take advantage of market dislocations to better serve your clients and their investment portfolios. 1 hour of CFP® CE and FL Ins.

2:10	**Breakout Sessions:** **LAKE MARY** **Tax Deferred Real Estate Solutions** **MLG Capital– Connor Donohue** Financial Professionals will learn how to provide a tax-deferred solution for owners of appreciated real estate, allowing clients to contribute property in exchange for fund units. Using a tax deferral real estate fund is similar to 1031 DST's and UPREITs, with a differentiated advantage that we believe MLG is the only manager offering today. 1 hour of CFP® CE and FL Ins. **SEMINOLE** **Your Caring Law Firm: Merrell Bailey** **Estate Planning for Single People** Single means a lot of things. Is the person a young single? An old single? Divorced single? Widowed single? Not married but not really single? Married but acts single? Single parent? We'll discuss each situation and how it might lead to a different estate planning result for your clients. 1 hour of CFP® CE and FL Ins **SALON IV** **Hines: Travis Conlan** **How to use Real Estate for Income, Growth & Tax Efficient Solutions for Clients** Join Travis Conlan as he provides a comprehensive view of the real estate market landscape, focusing on three key areas, growth, income and tax efficiency. The presentation will begin with an overview of the macroeconomic landscape, followed by a comprehensive update on the fundamentals, broken down by region. Finally, Travis will share valuable insights that should be beneficial when discussing with investors. 1 hour of CFP® CE and FL Ins
	Room Change
3:05	**Tax Differed Real Estate Solution Session Repeats – Lake Mary** **Your Caring Law Firm: Merrell Bailey - Seminole** **Someone Died. Now What?** The logistics of death can be overwhelming. What do loved ones need to do first? Second? Fifteenth? Who knows all the information required for a death certificate? Who picks the funeral home? Will a probate be necessary? Who notifies the credit bureaus? Do we really need a lawyer? Let's walk through the basics so you may more easily guide your clients. 1 hour of CFP® CE and FL Ins **Real Estate Session Repeats – Salon IV**
3:55	**Networking Break with Resource Partners**

4:15	**Breakout Sessions:** **LAKE MARY** **Exit Factor: Ed Dellheim** **Turning Your Client’s Business into a Larger Asset** Unlock the hidden goldmine in your small business clients: their untapped enterprise value. As a fiduciary advisor excelling in managing investable assets, you've been limited in your impact on the business itself—until now. Join exit planning expert Edward Dellhleim to learn how to be a trusted partner in transforming your clients' companies from a source of cashflow today to an amplified wealth asset tomorrow, priming them for multimillion-dollar exits. Discover proven strategies to: • Maximize business valuation through targeted optimizations (e.g., Revenue Enhancement, Target Operating Models, SOPs, Succession Planning). • Integrate exit readiness into your holistic planning approach without expanding your scope. 1 hour of CFP® CE and FL Ins **SEMINOLE** **LaCorr Funds: Chris Moreno** **Move Over 60/40** The program will aid advisors in understanding how bonds have performed historically and how they have performed more recently, how stocks and bonds have become increasingly correlated, how a 60/20/20 portfolio could be beneficial to a portfolio and how best to create this 20% allocation. The LoCorr team has been working with advisors for 20 years to educate them on the benefits of allocating to low-correlating strategies. 1 hour of CFP® CE and FL Ins **SALON IV** **Movement Mortgage:** **Harlan Accola** **Integrating Home Equity into Comprehensive Retirement, Tax, and Wealth Transfer Planning** This program explores how housing wealth can be used strategically in retirement income planning, tax reduction, debt management, and wealth transfer. Using case studies and scenario analysis, financial professionals will learn how to integrate home equity, including reverse mortgages, within comprehensive plans to improve retirement outcomes, manage risk, and support client goals. The session emphasizes suitability, tax implications, and communication strategies to help advisors differentiate their practices and meet evolving client needs. 1 hour of CFP® CE and FL Ins
	Room Change
5:10	**Lake Mary – Exit Factor Session Repeats** **Seminole – LaCorr Funds Session Repeats** **Salon IV - Movement Mortgage Session Repeats**
6:00	**Cocktail Reception with Resource Partners** - *sponsored by TSC Bank*