

Insider's Forum 2025 - Schedule of Events

Time	Tuesday, September 23 - Workshop & Conference Sessions			
8:30AM - 11:30AM	OPEN TO ALL! HIFON Breakfast & Workshop led by Shaun Kapusinski, HIFON Founder 8:30am "AI Won't Save Your Firm - Client Segmentation Will" - Matt Sonnen, COO, Coldstream 9:30am "An Unlikely Career Path - Moving Forward Without a Map" - Janise Brooks, President, PAX Financial Group 10:30am "From Catch-All to Catalyst: Redefining the COO/CTO Role in Modern Wealth Management" - Jordan Hutchison, VP of Technology and Operations, RFG Advisory			
	Operations+Owners			
11:30AM -11:45AM	Lunch Buffet in Chamber Foyer			
11:30AM - 12:20PM	Lunch	"Student Meet & Greet" Roundtables over lunch		
	All	All		
12:30PM - 1:20PM (50 minutes)	Operations Roundtables - (topics and table numbers to be announced in the conference app)	Owners & Advisors Roundtables - (topics and table numbers to be announced in the conference app)		
	Operations	Owners+Advisors		
1:35PM - 2:25PM (50 minutes)	"Compliance & Legal Issues Surrounding Your Tech Stack" - Joseph Antonakakis, Stark & Stark+Jeffrey Lang, Stark & Stark	"Trust & Estate Planning - Providing Customized Service and Managing Trust Assets" - Mike Bennett, EncorEstate Plans+Rosemary Hueser, BOK Financial		
	All	All		
2:40PM - 3:30PM (50 minutes)	"A New Approach to Lifecycle Planning & Investing" - Jeff Coyle, Libretto	"From Inheritance to Influence: Winning the Next Generation of Wealth" - Bill Koppel, TradePMR		
	All	All		
3:45PM-4:00PM	Conference Welcome, Insider's Forum Leadership Award Presentation			
4:00PM-5:15PM (75 minutes)	Keynote - "The New Realities of Succession" - Philip Palaveev, The Ensemble Practice			
5:15PM -7:00PM	Opening Reception & Networking in the Exhibit Hall/Promenade & Salons 1, 2			
Time	Wednesday, September 24 - Conference Sessions			
7:30AM - 8:30AM	Sit Down Breakfast in Salons 3,4 & 5			
8:30AM-8:45AM	Announcements & Student Introductions			
8:45AM-10:00AM (75 minutes)	Keynote - "Scaling Extraordinary Client Experiences" - Julie Littlechild, Absolute Engagement			
10:00AM -11:00AM	Networking in the Exhibit Hall/Promenade & Salons 1, 2			
11:00AM -12:15PM (75 minutes)	"Scaling Smart: Adding Leadership Roles Without Losing Agility or Profit" - Kara Armstrong, CapSouth+Stacey McKinnon, Morton Wealth+Matt McGinniss, The Ensemble Practice (moderator)	"Redefining Succession: Designing a Meaningful Business Transition " - Brooklyn Brock, Ellevate Advisors+Tiffany Lee, Ellevate Advisors	"Success Stories in Organic Growth" - Chevonne Farler, TBH Advisors+Debra Tagg, BFS Advisory Group+Susan Theder, FMG+Bob Veres, Inside Information (moderator)	
	Operations+Owners	Advisors+Owners	All	
12:15PM - 1:30PM	Sit Down Lunch in Salons 3,4 & 5			
1:30PM - 2:45PM (75 minutes)	"Best Planning Ideas" - Lyle Benson, L.K. Benson & Co.+Katharine George, Wealthstream Advisors+Scott Sprinkle, Sprinkle Financial	"From Idea to Impact: Lessons Learned in Launching a New Service Offering" - Chris Galeski, Morton Wealth+Stacey McKinnon, Morton Wealth	AI Note-Taking Tools: User Experiences - Jennifer Fensley, CapSouth+Taylor Geist, Carson Group+Charles Tiblier, Stokes Family Office+Bob Veres, Inside Information (moderator)	
	Advisors	Operations+Owners	All	

3:00PM - 3:50PM (50 minutes)	"Modeling the Cost of Long-Term Care" - Evan Ehrenberg, Waterlily+Lily Vittayarukskul, Waterlily	"Next Generation Leadership From a Next Gen Leader" - Courtney Sukitch, Waldron Private Wealth	"Breaking Through the Middle" - Chris Pelch, Vance Wealth+John Vance, Vance Wealth+Kristen Pierson, Herbers & Co. (moderator)
	<i>Advisors</i>	<i>All</i>	<i>All</i>
3:50PM - 5:00PM	<i>Networking in the Exhibit Hall/Promenade & Salons 1, 2</i>		
5:00PM-5:50PM (50 minutes)	Keynote - "The Next Custodial Platform" - Arthur Worthington, SEI		
5:50PM - 7:20PM	<i>Reception & Networking in the Exhibit Hall/Promenade & Salons 1, 2</i>		
Time	Thursday, September 25 - Conference Sessions		
7:30AM - 8:30AM	<i>Breakfast Buffet in Exhibit Hall/ Promenade & Salons 1, 2</i>		
8:30AM-9:45AM (75 minutes)	Keynote - "Joel Tells Us What We Need to Know About Tech" - Joel Bruckenstein, T3		
9:45AM-10:40AM	<i>Networking in the Exhibit Hall/Promenade & Salons 1, 2</i>		
10:40AM -11:30AM (50 minutes)	Keynote - "AI Advanced Use Cases & Your Future Tech Stack " - Spenser Segal, ActiFi+Bob Veres, Inside Information		
11:30AM-11:45AM	Conference Wrap Up		