

## Insider's Forum 2025 - Schedule of Events

Time	Tuesday, September 23 - Workshop & Conference Sessions		
8:30AM - 11:30AM	HIFON MEMBERS AND NON-MEMBERS ARE WELCOME!		
	HIFON Breakfast & Workshop led by Shaun Kapusinski, HIFON Founder		
	Operations+Owners		
11:30AM -11:45AM	Lunch Buffet in Chamber Foyer		
11:30AM - 12:20PM	Lunch	"Student Meet & Greet" Roundtables over lunch	
	Operations	All	
12:30PM - 1:20PM (50 minutes)	Operations Roundtables	Owners & Advisors Roundtables	
	Operations	Owners+Advisors	
1:35PM - 2:25PM (50 minutes)	TBA	TBA	
	All	All	
2:40PM - 3:30PM (50 minutes)	"Unified Total Wealth Planning and Investing" - Jeff, Coyle, Libretto	TBA	
	All	All	
3:45PM-4:00PM	Conference Welcome, Insider's Forum Leadership Award & Inside Information Iconoclast Award Presentations		
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)	"Adding Professional Capabilities Affordably" - Kara Armstrong, CapSouth+Stacey McKinnon, Morton Wealth+Matt McGinniss, The Ensemble Practice ( moderator)	"Getting Ready for Succession" - 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	"How to Develop a New Service Offering: A Case Study" - Chris Galeski, Morton Wealth+Stacey McKinnon, Morton Wealth	"AI Note-Taking Tools: User Experiences" - Jennifer Fensley, CapSouth+TBA+Bob Veres, Inside Information (moderator)
	Advisors	Operations+Owners	All
3:00PM - 3:50PM (50 minutes)	"Modeling the Cost of Long-Term Care" - Lily Vittayarukkul, 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)
	Advisors	All	All
3:50PM - 5:00PM	Networking in the Exhibit Hall/Promenade & Salons 1, 2		
5:00PM-5:50PM (50 minutes)	Keynote - TBA		
5:50PM - 7:20PM	Reception & Networking in the Exhibit Hall/Promenade & Salons 1, 2		
Time	Thursday, September 25 - Conference Sessions		
7:30AM - 8:30AM	Breakfast Buffet in Exhibit Hall/ Promenade & Salons 1, 2		
8:30AM-9:45AM (75 minutes)	Keynote - "Joel Tells Us What We Need to Know About Tech" - Joel Bruckenstein, T3		
9:45AM-10:40AM	Networking in the Exhibit Hall/Promenade & Salons 1, 2		
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
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