

Insider's Forum 2026 - Schedule of Events

Time	Wednesday, September 16 - Workshop & Conference Sessions	
8:00AM - 11:30AM	OPEN TO ALL! HIFON Breakfast & Workshop led by Shaun Kapusinski, HIFON Founder 8:00am - Breakfast Buffet 8:30am - "The AI Edge" - Matt Reiner 9:30am - "Playing To Your Strengths To Grow Your Firm" - Travis Rychnovsky 10:30am - "Lessons Learned from 40 Years in an RIA" - Yohnee Gordon	
	<i>All</i>	
11:30AM - 12:20PM	<i>Lunch</i>	<i>"Student Meet & Greet" over lunch</i>
	<i>Operations</i>	<i>All</i>
12:30PM - 1:20PM (50 minutes)	<i>Roundtables - topics in the app & in the detailed agenda on the website</i>	<i>Roundtables - topics in the app & in the detailed agenda on the website</i>
	<i>All</i>	<i>All</i>
1:35PM - 2:25PM (50 minutes)	"Technology – Including AI – That Supports & Drives Growth"- Thomas Clawson, Slant+Sara Rehman, Agilno+Fernando San Martin Jorquera, Hazel/Altruist+Bob Veres, Inside Information (moderator)	"What the Succession Literature Doesn't Tell You" - Rick Kahler, Kahler Financial Group
	<i>All</i>	<i>All</i>
2:40PM - 3:30PM (50 minutes)	"The Advisor's Next Role: Architect of Total Wealth" - Jeff Coyle, Libretto	TBA - SEI
	<i>All</i>	<i>All</i>
3:45PM-4:00PM	<i>Conference Welcome</i>	
4:00PM-5:15PM (75 minutes)	Keynote - "Bob & Joel Argue About Tech" - Joel Bruckenstein,T3+Bob Veres, Inside Information	
5:15PM -7:00PM	<i>Opening Reception & Networking in the Exhibit Hall/Capitol Foyers North & South</i>	
Time	Thursday, September 17 - Conference Sessions	
7:30AM - 8:30AM	<i>Sit Down Breakfast</i>	
8:30AM-8:45AM	Announcements & Student Introductions from BYU Idaho+Kansas State University+Texas Tech University+Utah Valley University	
8:45AM-10:00AM (75 minutes)	Keynote - "Key Career Lessons & Insights - Regulatory & More!" - Tom Giachetti, Stark & Stark+Bob Veres, Inside Information	

10:00AM -11:00AM	Networking in the Exhibit Hall/Capitol Foyers North & South	
11:00AM -12:15PM (75 minutes)	KPI Development & Management - Randy Brunson, Centurion Advisory Group+Matt Cosgriff, Apella Wealth+Spenser Segal, ActiFi+Bob Veres, Inside Information (moderator)	"Growth Risks: Where The Threats & Opportunities Lie for RIAs" - Angie Herbers, Herbers & Co.+Kristen Pierson, Herbers & Co.
	Operations+Owners	All
12:15PM - 1:30PM	Buffet Lunch	
1:30PM - 2:45PM (75 minutes)	"Total Firm Marketing" - Marianela Collado,Tobias Financial Advisors+Andres Garcia, Zoe Financial+Travis Rychnovsky, Foster Group+ Bob Veres, Inside Information (moderator)	"Aligning Compensation & Culture to Drive Organic Growth" - Kara Armstrong, CapSouth Wealth Management+Jennifer Fensley, CapSouth Wealth Management+Kate Kammes, JMG Financial Group
	All	All
3:00PM - 3:50PM (50 minutes)	"Building Out Your Executive Team" - Lisa Crafford, Constellation Wealth Capital	"Innovations & Ideas from 3 Perspectives"- Justin Fitzpatrick, Income Lab (SS analysis tool)+Kevin Hughes, Advyzon+Brent Pretty, Verlo+Bob Veres, Inside Information (moderator)
	Owners	All
3:50PM - 4:50PM	Networking in the Exhibit Hall/Capitol Foyers North & South	
4:50PM-5:50PM (60 minutes)	Keynote - "Scaling the Magic" - Joe Martin, Summitry+Shannon Spotswood, RFG Advisory+Julie Littlechild, Absolute Engagement (moderator)	
5:50PM - 7:30PM	Reception & Networking in the Exhibit Hall/Capitol Foyers North & South	
Time	Friday, September 18 - Conference Sessions	
7:30AM - 8:30AM	Breakfast Buffet	
8:30AM-9:45AM (75 minutes)	Keynote - "Capacity-Led Growth Strategies: Unlocking Growth Through Collaboration, Culture, & Creativity" - Angie Herbers, Herbers & Co.	
9:45AM-10:40AM	Networking in the Exhibit Hall/Capitol Foyers North & South	
10:40AM -11:30AM (50 minutes)	Keynote - "Creating a Profession: Where Are We Now?" - Bob Veres, Inside Information	
11:30AM-11:45AM	Conference Wrap Up	