

Insider's Forum 2026 - Schedule of Events

Time	Wednesday, September 16 - Workshop & Conference Sessions		
8:30AM - 11:30AM	OPEN TO ALL! HIFON Breakfast & Workshop led by Shaun Kapusinski, HIFON Founder 8:30am - Travis Rychnovsky 9:30am - Yohnee Gordon 10:30am - Matt Reiner		
	<i>All</i>		
11:30AM - 12:20PM	Lunch	"Student Meet & Greet" over lunch	
	<i>Operations</i>		
	<i>All</i>		
12:30PM - 1:20PM (50 minutes)	Roundtables - topics TBA		Roundtables - topics TBA
	<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, Hazel/Altruist+Bob Veres, Inside Information (moderator)		TBA
	<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
	<i>All</i>		<i>All</i>
3:45PM-4:00PM	Conference Welcome		
4:00PM-5:15PM (75 minutes)	Keynote - "Bob & Joel Argue About Tech" - Joel Bruckenstein, T3+Bob Veres, Inside Information		
5:15PM - 7:00PM	Opening Reception & Networking in the Exhibit Hall/Capitol Foyers North & South		
Time	Thursday, September 17 - Conference Sessions		
7:30AM - 8:30AM	Sit Down Breakfast		
8:30AM-8:45AM	Announcements & Student Introductions from BYU Idaho+Kansas State University+Texas Tech 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" - Matt Cosgriff, Cosgriff Consulting+ Jeff Smith, Plancorp+TBD (moderator)	"Scaling the Magic" - Misty House, Kingsview Advisors+Joe Martin, Summitry+Julie Littlechild, Absolute Engagement (moderator)	"Growth Risks: Where The Threats & Opportunities Lie for RIAs" - Angie Herbers, Herbers & Co.+Kristen Pierson, Herbers & Co.
	<i>Operations+Owners</i>	<i>All</i>	<i>All</i>
12:15PM - 1:30PM	Sit Down 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	
	<i>All</i>	<i>All</i>	
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)	
	<i>Owners</i>	<i>All</i>	

3:50PM - 5:00PM	<i>Networking in the Exhibit Hall/Capitol Foyers North & South</i>
5:00PM-5:50PM (50 minutes)	Keynote - TBA
5:50PM - 7:20PM	<i>Reception & Networking in the Exhibit Hall/Capitol Foyers North & South</i>
Time	Friday, September 18 - Conference Sessions
7:30AM - 8:30AM	<i>Breakfast Buffet</i>
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	<i>Networking in the Exhibit Hall/Capitol Foyers North & South</i>
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