

## GRAND HYATT (SUMMIT DE BALLROOM)

*Wednesday, May 7*

**10:30AM - 12:00PM** **WOMEN IN WEALTH BRUNCH**  
Continental Restaurant - Lobby Level (Next to Hotel Entrance)

**1:00PM - 1:45PM** **OPENING ADDRESS: ELEVATE YOUR BUSINESS IN TODAY'S UNIQUE MARKET**  
**David DeVoe, Founder & CEO, DeVoe & Company**  
DeVoe & Company Founder & CEO, David DeVoe, kicks off Elevate with a discussion of why it is so important to focus on organic growth today. The dynamics of the current marketplace present a rare opportunity for advisors to drive exponential results from their business development activities. This session will explore both strategic concepts and practical tactics to accelerate growth, foster a growth-oriented culture, and ultimately get you there — to a place where your firm is thriving and built for lasting success.

**1:45PM - 2:40PM** **CRAFTING A HIGH-PERFORMANCE BUSINESS**  
**Jay Therrien, Managing Director of Executive Consulting, Invesco**  
Told through the lens of prospecting and onboarding an ultra-affluent family, Jay Therrien will explore how to construct a business capable of attaining and retaining a high-net-worth clientele. Every business, regardless of industry, is composed of two components: structure and people. If the business lacks a coherent structure and repeatable systems, that deficiency can stifle the productivity of even the most talented and engaged personnel. If, on the other hand, the business is well-structured but the people are misaligned and/or poorly trained, results could also suffer. Jay will reveal a four-step process designed to enhance your business structure, systems, and people to deliver on a differentiated and sophisticated client engagement experience.

**2:40PM - 3:10PM** **NETWORKING BREAK**  
Partner Exhibits in the Exhibitor Lounge

**3:10PM - 4:05PM** **THE PROFESSIONAL REFERRAL METHOD: BECOMING THE TRUSTED ADVISOR**  
**Ken Haman, Managing Director of the AB Advisor Institute, AllianceBernstein**  
In today's evolving market, financial advisors must shift their messaging beyond being valuable to being referable, resonating not only with clients but also with the professionals who serve as trusted gatekeepers to wealthy families. Ken Haman will share four specific strategies for reaching this new market. Learn how to spark warm introductions, craft a referable message, deliver impactful presentations, and close meetings with clear, actionable next steps.

**4:05PM - 5:00PM** **THE GROWTH MINDSET: HOW TOP RIAs ARE DRIVING GROWTH**  
**Jason Gordo, President & Co-Founder, Modern Wealth Management**  
**Jordan Greenhouse, Senior Managing Director, Chief Growth Officer, Lido Advisors**  
**Sam Davis, Managing Member, Financial Advisor, TBH Advisors**  
**Moderator: Adam Levy, Managing Director, DeVoe & Company**  
Discover how leading RIAs are fueling real growth and scaling with purpose. In this panel, top experts will share the mindsets, strategies, and lessons that are driving results—what's working, what they've learned, and how they're approaching growth in new ways. You'll walk away with practical, actionable insights to move your firm forward.

**6:30PM - 9:00PM** **MAIN EVENING EVENT AT CATEGORY 10**  
120 2<sup>nd</sup> Ave N, Nashville, TN 37201

*Thursday, May 8*

**7:30AM - 8:30AM** **NETWORKING BREAKFAST**  
Exhibitor Lounge: Registration | Breakfast | Partner Exhibits

**8:30 AM - 9:25AM****KEYNOTE ADDRESS: SUPERCHARGING RIA GROWTH: UNLOCKING COMPETITIVE ADVANTAGE****John Mittnacht, Special Advisor, DeVoe & Company**

As an expert in driving high-impact growth for RIAs, John Mittnacht will transform the way you approach growth. In this session, he'll show you how to break free from outdated tactics and craft a powerful, integrated strategy that delivers sustainable, scalable results.

**9:25AM - 10:15AM****GROWTH, ENGINEERED: SMART TECH STRATEGIES THAT SCALE****Shell Black, President, ShellBlack****Andres Garcia-Amaya, Founder & CEO, Zoe Financial****Yelena Melamed, Head of Product, Catchlight****Moderator: Christine Cataldo, Chief Technology & Digital Officer, Mercer Advisors**

The right technology doesn't just make things easier—it drives measurable growth. In this session, top tech innovators share how smart tools are reshaping marketing, client engagement, and business development. From AI to automation, discover the technologies that are fueling growth today—and what's on the horizon. Walk away with actionable strategies to help your firm grow faster, smarter, and more efficiently.

**10:15AM - 10:40AM****NETWORKING BREAK****Partner Exhibits in the Exhibitor Lounge****10:40AM - 11:30AM****THE ADVISOR GUIDE TO CLIENT ACQUISITIONS****Jon Wainman, Advisor Practice Management Consultant, Capital Group****Scott Grouten, Senior Vice President - Strategic Relationship Manager, Capital Group**

The Guide to Client Acquisition helps to put advisors and firms on the path to creating a consistent, repeatable process for finding and attracting more ideal clients to your firm. This is accomplished through narrowing in on the profitable niches, tailoring your value proposition, making the most of your marketing and getting creative with events.

**11:30AM - 12:05PM****AI AND RIAs: A NEW ERA OF OPPORTUNITY****Parker Ence, CEO & Co-Founder, Jump AI**

Artificial intelligence isn't just a buzzword — it's reshaping the RIA space at a rapid pace. In this session, we'll explore how AI is driving smarter client engagement, streamlining operations, and unlocking new growth opportunities for RIAs. We'll focus on how AI-powered tools are enabling advisors to deepen client relationships by capturing richer insights, personalizing interactions, and freeing up more time for meaningful conversations. Whether you're just starting to explore AI or looking to scale your firm's capabilities, this conversation will help you navigate the evolving landscape with confidence, clarity, and a stronger connection to the clients you serve.

**12:05PM - 1:15PM****NETWORKING LUNCH****Exhibitor Lounge: Registration | Lunch | Partner Exhibits****1:15PM - 1:45PM****UNLOCKING THE POWER OF HUMAN CAPITAL****David DeVoe, Founder & CEO, DeVoe & Company**

DeVoe & Company Founder & CEO, David DeVoe, opens the Human Capital track by exploring how talent strategy is becoming a defining factor in firm success. Using exclusive findings from DeVoe's RIA Talent & Growth Survey and field insights from top-performing RIAs, Dave outlines how firms can elevate team performance, avoid common talent pitfalls, and take practical steps to unlock the full potential of their people.

**1:45PM - 2:45PM****KEYNOTE ADDRESS: DYNAMIC LEADERSHIP AND THE ENDURING ADVISORY FIRM****Mark Tibergien, Former CEO of Pershing Advisor Solutions, LLC**

As the RIA industry continues to evolve, achieving success goes far beyond a solid business plan. It demands exceptional leadership, a strategic approach to human capital, and the ability to manage change effectively. Mark Tibergien will focus on the critical elements of running and scaling a successful advisory firm with an emphasis on talent development, dynamic management, leadership, and achieving critical mass.

**2:45PM - 3:15PM****NETWORKING BREAK**

Partner Exhibits in the Exhibitor Lounge

**3:15PM - 4:15PM****SUCCESSION IN PRACTICE: REAL STORIES, REAL STRATEGIES**

**Andy Brown, President, Capital Advisors**  
**Scott Mizer, Partner and President, The Joseph Group**  
**Lyle Minton, Chief Investment Officer, Keel Point**  
**Moderator: Peggy Ruhlin, Special Advisor, DeVoe & Company**

Succession planning isn't one-size-fits-all, but hearing how others have navigated it can offer valuable direction. In this thoughtful panel, industry leaders share their real-world succession experiences—what worked, what they'd approach differently, and how they designed plans aligned with their firm's culture and long-term goals. Walk away with practical insights you can adapt to your own transition journey.

**4:15PM - 4:30PM****SPOTLIGHT: FOUNDATION FOR FINANCIAL PLANNING**

**Scott Kahan, Board Member, Foundation for Financial Planning**

As an advisor, you can help change someone's life. In this spotlight, Scott Kahan, Board Member of the Foundation for Financial Planning, discusses the organization's impact via pro bono work, and how you can get involved.

**4:30PM - 6:00PM****ONE-ON-ONE EXPERT MEETINGS (SUMMIT DE BALLROOM)  
EVENING RECEPTION (EXHIBITOR LOUNGE)***Friday, May 9***7:30AM - 8:30AM****NETWORKING BREAKFAST**

Exhibitor Lounge: Registration | Breakfast | Partner Exhibits

**8:30 AM - 9:25AM****BUILDING CULTURE: HOW ELITE LEADERS BUILD A TEAM AND INFLUENCE BEHAVIOR**

**Rob Montella, Business Consultant, First Trust Portfolios**

Learn how top leaders in the RIA industry build strong, high-performing teams and foster a culture that drives success. Rob Montella, Business Consultant at First Trust, will explore proven strategies for cultivating a positive organizational culture that influences behavior and where top talent can thrive, ensuring long-term success for your firm.

**9:25AM - 10:10AM****PEOPLE POWER: HOW RIAS BUILD AND KEEP GREAT TEAMS**

**Ben Harrison, Managing Director, Head of Client Business Services, BNY Pershing**  
**Aimee Jachym, Member, Miller Johnson**  
**Kyle Glenn, Principal & Chief Operating Officer, Homrich Berg**  
**Moderator: Ed Moore, Special Advisor, DeVoe & Company**

Attracting top talent is only step one—retaining and inspiring high performers requires strategic alignment, intentional leadership, and a culture that goes beyond compensation. In this dynamic panel, hear from legal, recruiting, and RIA leadership experts as they share real-world strategies for building teams that thrive. From smart hiring practices to creating a workplace people want to stay in, you'll walk away with actionable insights on what works—and what doesn't—in today's competitive RIA talent market.

**10:10AM - 10:35AM****NETWORKING BREAK**

Partner Exhibits in the Exhibitor Lounge

**10:35AM - 11:05AM****STRUCTURING INCENTIVES THAT DRIVE GROWTH**

**Doug Johnson, Managing Director, DeVoe & Company**

Incentive compensation is one of the most powerful and misunderstood tools in the RIA toolbox. Join Doug Johnson, Managing Director at DeVoe & Company, as he demystifies how to design compensation plans that motivate your team, align with firm goals, and actually work. Whether you're looking to retain top talent or fuel next-level growth, this session will give you the practical insights you need to rethink your approach. No fluff. Just real talk and real strategies.

**11:05AM - 11:50AM NEXT-GEN CAPITAL: FUELING TOMORROW, TODAY**

**James Hughes, Head of Professional Services Lending, Live Oak Bank**

**Russ Larsen, Group Executive Vice President, Wintrust**

**Dustin Mangone, Managing Partner & Director of Investment Advisor Services, PPC LOAN**

**Moderator: Brad Grubb, Managing Director, DeVoe & Company**

Succession doesn't stall from lack of interest, it can often stall from lack of funding. In this session, a panel of lending experts share how firms are helping G2 and G3 advisors buy in and take the reins. Through real-world case studies and smart financing strategies, you'll learn how to fund equity transitions, acquisitions, and ownership shifts that keep your next-gen plans moving forward.

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**11:50AM - 11:55AM CLOSING COMMENTS**

**DeVoe & Company**

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*Program Ends at 12:00pm*

*\*Schedule is subject to change. More sessions and speakers to be added.*