

## AGENDA

November 6–7, 2025

The Umstead Hotel and Spa, Cary, NC

### Dress Code:

*Reception & Awards Dinner – semi-formal / business attire. All other conference events – business casual.*

### Thursday, Nov 6<sup>th</sup>

|               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                    |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| 2:00pm-3:00pm | <b>Afternoon Tea and Networking</b><br><i>Sponsored by Franklin Madison</i>                                                                                                                                                                                                                                                                                                                                                                                                                       | Ballroom Prefunction                                                               |
| 3:00pm        | <b>General Session</b><br><b>Welcome: Top Directors Deliver for the Financial Institution</b><br><b>C-Suite Conversation: Managing Up to Institution Leadership</b><br><i>Sponsored by Terrapin Technologies</i><br><i>Bill Partin, Former President, Sharonview Credit Union</i><br><b>Panel: Learning from Other Delivery Channels</b><br><i>Paul Haines, Mariner Wealth Advisors</i><br><i>Casey Knight, ESP Financial Search</i><br><i>Robert Matricardi, The Pelora Group of Mass Mutual</i> | Ballroom                                                                           |
| 6:00pm        | <b>Reception</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Musical Entertainment<br><i>sponsored by Delaware Life</i><br>Ballroom Prefunction |
| 7:00pm        | <b>Dinner</b><br><i>Sponsored by Raymond James</i><br><b>2025 Top Directors Awards: Presented by Ameriprise</b><br>Small Firms: <i>Sponsored by LPL Financial</i><br>Mid-size Firms: <i>Sponsored by Cetera Financial Institutions</i><br>Emerging Firms<br>Women-Led Firms<br>Large Firms: <i>Sponsored by The Standard</i><br>Credit Unions: <i>Sponsored by TruStage</i><br>Mega Firms: <i>Sponsored by Midwood Financial Services, Inc.</i>                                                   | Ballroom                                                                           |
| 9:00pm        | <b>After Party</b><br><i>Sponsored by Asset-Map</i>                                                                                                                                                                                                                                                                                                                                                                                                                                               | Ballroom Prefunction                                                               |

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### Friday, Nov 7th

|               |                                                                                                                                                                                                                                                                                                    |                      |
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| 8:00am-9:00am | <b>Breakfast</b><br><i>Sponsored by Midwestern Securities</i>                                                                                                                                                                                                                                      | Ballroom Prefunction |
| 9:00am        | <b>Keynote Address</b><br><i>Sponsored by Midwestern Securities</i><br><br><b>Silver Tsunami: How to Retain and Attract Money in Motion During the Coming Wave of Intergenerational Wealth Transfer</b><br><br><i>Luke Allchin, Director of Research &amp; Insights, North America, RFI Global</i> | Ballroom             |
| 10:00am       | <b>Break</b>                                                                                                                                                                                                                                                                                       |                      |
| 10:30am       | <b>The Morning Mixer: Session 1</b><br>Green Group & Yellow Group<br>Red Group & Blue Group                                                                                                                                                                                                        | Cedar<br>Boardroom   |
| 11:00am       | <b>The Morning Mixer: Session 2</b><br>Red Group & Green Group<br>Yellow Group & Blue Group                                                                                                                                                                                                        | Cedar<br>Boardroom   |
| 11:30am       | <b>The Morning Mixer: Session 3</b><br>Red Group & Yellow Group<br>Green Group & Blue Group                                                                                                                                                                                                        | Cedar<br>Boardroom   |
| 12:00pm       | <b>Farewell Lunch</b><br>Buffet lunch and refreshments available until 1:00pm                                                                                                                                                                                                                      | Ballroom Prefunction |

#### Additional Information:

Hotel Checkout is at 12pm. Please factor in 10 minutes of travel time to the Raleigh-Durham airport. Taxis and ride shares are readily available.