HUNT '26 CLIENT CONFERENCE | cheetah

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TUESDAY, NOVEMBER 10			
9:00 am–12:00pm	Cheetah Training in Harbor Ballroom A		
12:00–1:00 pm	Cheetah Training Lunch		
12:00–1:00 pm	Operations Committee Lunch		
1:00–4:00 pm	Operations Committee Meeting in Harbor Ballroom B		
5:00–6:00 pm	Prospect Reception in Midnight Sun Tent		
6:00–8:00 pm	Welcome Reception for all Hunt attendees on River Lawn - *food + venue sponsored by AssetMark and beverages sponsored by Fifth Third*		
WEDNESDAY, NOVEMBER 11			
8:00–9:00 am	Breakfast - *sponsored by ICE Data Services* in Harbor Ballroom		
9:00–9:15 am	*Welcome* in Grand Ballroom CDEF		
9:15–9:30 am	*Sponsor introductions* in Grand Ballroom CDEF		
9:30–10:30 am	*Cheetah State of the Union,* **Adam Unger**, CEO, Accutech Systems in Grand Ballroom CDEF		
10:30–11:00 am	Break - *sponsored by Federated Hermes* in Grand Ballroom Pre Function		
11:00 am–12:00 pm	*Stewarding Wealth Through Uncertainty: Key Market Trends Shaping Client Portfolios in 2027,* **Tim Holland,** Chief Investment Officer, Orion - *Introduction of speaker by First Rate* in Grand Ballroom CDEF **(1.25 ATOP + 1.25 CTFA + 1.25 CSOP + 1.25 CERP)**		
12:00–1:00 pm	Lunch - *sponsored by CAPIS* in Harbor Ballroom		
1:00–2:00 pm	*Be the First: How to Take Bold, Intentional Steps Through Uncertainty and Redefine What's Possible,* **Angela Gargano,** 6x American Ninja Warrior, 3x Cover Athlete, Miss Fitness America, Keynote Speaker - *Introduction of Key Note Speaker by NewEdge in* Grand Ballroom CDEF		
2:00–2:30 pm	Break - *sponsored by RevSpring* in Grand Ballroom Pre Function		
2:30–3:30 pm	Vision Track	Accelerate Track	Execution Track
	Maximizing the Value of a Contact Management System, **Michael Dixon**, Pohl Consulting and Training, Inc. in Grand Ballroom B **(1.25 CFMP)**	*Cheetah Investments Unleashed: Smarter, Faster, Stronger,* **Shane Pond,** Solutions Consultant, Cheetah in Grand Ballroom A **(1.25 ATOP + 1.25 CTFA + 1.25 CSOP)**	*From Bottlenecks to Flow: Rethinking Approval Strategies*, **Jill Droll,** Wealth Management Consultant, **Greg Lambert,** Wealth Management Consultant, and **Jerry Gillespie,** Team Lead, Wealth Management Consultant, Cheetah in Grand Ballroom CDEF **(1.25 ATOP + 1.25 CTFA + 1.25 CERP + 1.25 CRCM)**
3:30–4:30 pm	*Strategic Outsourcing in Wealth Management: Expanding Capacity, Enhancing Outcomes,* **S. Adam Stone**, President - Wealth Management + Trust, National Exchange Bank + Trust, **John Henry**, Business Development Officer, Financial Institutions, AssetMark in Grand Ballroom A **(1.25 ATOP + 1.25 CTFA + 1.25 CERP + 1.25 CRCM)**	*Turning AI into Business Value: What We're Doing and What You Should Be Doing,* **Linc Mitchell,** Executive Vice President, Innovation, and **Calee Fulling,** Software Developer II - Team Lead, Cheetah in Grand Ballroom CDEF **(1.25 CERP + 1.25 CRCM)**	
6:00–9:00 pm	Dinner at The Mackey House (190 Red Gate Farms Trail, Savannah, GA 31405) - *Dinner sponsored by Orion. Beverages sponsored by WealthHub Solutions. Event Golf + DJ sponsored by Broadridge*		
THURSDAY, NOVEMBER 12			
7:00–8:30 am	Breakfast - *sponsored by Elite* in Harbor Ballroom		
8:30–9:30 am	*The Rise of Prediction Markets,* **John O'Connell,** CEO and Founder, The Oasis Group - *Introduction of speaker by R&T* in Grand Ballroom CDEF **(1.25 ATOP + 1.25 CTFA + 1.25 CSOP + 1.25 CRCM)**		
9:30–10:00 am	Break - *sponsored by Federated Hermes* in Grand Ballroom Pre Function		
10:00–11:00 am	*From Satisfactory to Legendary: Build Raving Fans and Customer Loyalty Through a Five-Star Customer Experience,* **Micah Solomon,** Author, Consultant, Speaker - *Introduction of speaker by Smartleaf* in Grand Ballroom CDEF **(1.25 CFMP)**		
11:00 am–12:00 pm	Vision Track	Accelerate Track	Execution Track
	Evolving Trust Operating Models, **Trasha Schwendener,** Managing Director, F2, and **Scott Lamont,** Senior Managing Director in Grand Ballroom A **(1.25 ATOP + 1.25 CTFA + 1.25 CRCM + 1.25 CFMP)**	*How well do you know your clients and prospects?,* **Michael Dixon**, Pohl Consulting and Training, Inc. in Grand Ballroom B **(1.25 ATOP + 1.25 CTFA + 1.25 CFMP)**	*Smarter Reviews, Stronger Compliance: Unlocking Intelligent Workflows* **Jill Droll,** Wealth Management Consultant, **Greg Lambert,** Wealth Management Consultant, and **Jerry Gillespie,** Team Lead, Wealth Management Consultant, Cheetah in Grand Ballroom CDEF **(1.25 ATOP + 1.25 CTFA + 1.25 CRCM)**
12:00–1:00 pm	Lunch - *sponsored by MainStreet* in Harbor Ballroom		
1:00–2:00 pm	Vision Track	Accelerate Track	Execution Track
	Navigating the New Era of Trust, **Dan Wright,** Cheetah, **The Oasis Group, Pohl Consulting and Training Inc., F2 Strategy,** and **TrustWorthy Consultants** in Grand Ballroom A **(1.25 ATOP + 1.25 CTFA + 1.25 CERP)**	*The Rise of Tokenization,* **Robert Krugman,** Chief Digital Officer, Broadridge in Grand Ballroom B **(1.25 ATOP + 1.25 CTFA + 1.25 CSOP + 1.25 CRCM)**	*Exploring New Possibilities with Enhanced Features,* **Cole Horton**, Product Manager and Team Lead, Trust Solutions, Cheetah in Grand Ballroom CDEF **(1.25 ATOP)**
2:00–3:00 pm	*Living and Building a Five Star Customer Experience, Day to Day,* **Micah Solomon,** Author, Consultant, Speaker in Grand Ballroom A **(1.25 ATOP + 1.25 CFMP)**	Growing Your Business in 2027, **Brandon Jeffress**, CRO, Cheetah in Grand Ballroom B	*Stepping Up Your Account Opening Process,* **Patrick Alyward**, CEO, TrustWorthy Consultants, LLC in Grand Ballroom CDEF **(1.25 ATOP + 1.25 CTFA + 1.25 CRCM)**
3:00–3:30 pm	Break - *sponsored by Cheetah* in Grand Ballroom Pre Function		
3:30–5:00 pm	Vision Track	Accelerate Track	Execution Track
	Aim Small, Win Big: Marketing Strategies for HNW + UHNW Relationships, **Brandon Coppernoll,** Managing Director, Intersection in Grand Ballroom A **(1.75 CFMP)**	*Automated portfolio rebalancing is crushing it. We have the stats to prove it,* **Robey NeJame,** Managing Director of Sales, Smartleaf in Grand Ballroom B **(1.25 ATOP + 1.25 CTFA + 1.25 CSOP)**	*Cheetah Chats,* **Clients** and **Cheetah Staff** in Grand Ballroom CDEF **(1.75 ATOP)**
FRIDAY, NOVEMBER 13			
7:30–8:30 am	Breakfast - *sponsored by Chicago Clearing* in Harbor Ballroom		
8:30–9:30 am	*2026 Tax Update,* **Doug Hart, Deloitte** in Grand Ballroom CDEF **(1.25 ATOP + 1.25 CTFA)**		
9:30–9:45 am	Break - *sponsored by Federated Hermes* in Grand Ballroom Pre Function		
9:45–10:45 am	*Compliance Checkup: Hot Topics for Fiduciaries,* **Patrick Alyward,** CEO, TrustWorthy Consultants, LLC in Grand Ballroom CDEF **(1.25 ATOP + 1.25 CTFA + 1.25 CRCM)**		
10:45–11:00 am	*Closing remarks*		

Agenda is subject to change.

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