

## FAIRMONT (PALM PARK BALLROOM - 7TH FLOOR)

*Wednesday, May 6*

- 
- 10:30AM - 12:00PM**    **WOMEN IN WEALTH BRUNCH**  
Garrison Restaurant - Lobby Level
- 
- 1:00PM - 1:55PM**    **KEYNOTE ADDRESS: 7 HABITS OF HIGHLY EFFECTIVE GROWTH**  
John Mittnacht, Special Advisor, DeVoe & Company  
What separates the fastest-growing RIAs from the rest? In this session, growth expert John Mittnacht breaks down seven habits that drive effective organic growth. Walk away with actionable insights that will strengthen your competitive edge and position your firm for long-term success.
- 
- 1:55PM - 2:45PM**    **THE REFERRAL CODE: TURNING COIS INTO STRATEGIC GROWTH ENGINES**  
Jay Therrien, Managing Director of Executive Consulting, Invesco Global Consulting  
Shift your COI mindset to move beyond casual referrals and build strategic partnerships that generate a consistent flow of high-net-worth introductions from CPAs, attorneys, and other professionals. Learn a proven, research-based approach to unlocking this powerful growth channel—and a clear path to the ultra-affluent.
- 
- 2:45PM - 3:15PM**    **NETWORKING BREAK**  
Partner Exhibits in the Exhibitor Lounge
- 
- 3:15PM - 4:10PM**    **BUILT TO GROW: INSIDE THE STRATEGIES OF TOP RIAs**  
Sara Baker, EVP of Mergers & Acquisitions, Allworth Financial  
Rocky Daigle, Chief Practice Officer, Beacon Pointe Advisors  
Jason Gordo, President & Co-Founder, Modern Wealth Management  
Moderator: Adam Levy, Managing Director, DeVoe & Company  
Discover how top RIAs are driving real, sustainable growth. Learn what sets them apart. Industry leaders share what's working today, the lessons they've learned along the way, and how they're adapting in a changing landscape. Turn proven strategies into real growth for your firm.
- 
- 4:10PM - 5:00PM**    **FROM CLIENTS TO CHAMPIONS: THE REFERRAL PLAYBOOK**  
Stephen de Man, Regional Director & Vice President, Dimensional Fund Advisors  
Client referrals are a cornerstone of sustainable growth. This session will unpack the key drivers behind successful referral strategies and how firms turn strong client relationships into consistent new business opportunities.
- 
- 6:30PM - 9:00PM**    **OPENING RECEPTION AT GERALDINE'S**  
Located in the Hotel Van Zandt (605 Davis St, Austin, TX 78701)

*Thursday, May 7*

- 
- 7:30AM - 8:30AM**    **NETWORKING BREAKFAST**  
Exhibitor Lounge: Registration | Breakfast | Partner Exhibits
- 
- 8:30 AM - 9:25AM**    **OPENING ADDRESS: ELEVATING PERFORMANCE IN A NEW MARKET ERA**  
David DeVoe, Founder & CEO, DeVoe & Company

# AGENDA

## 9:25AM - 10:15AM **BUILT TO SCALE: TECH STRATEGIES FOR GROWTH**

Parker Ence, CEO & Co-Founder, Jump AI  
Andres Garcia-Amaya, Founder & CEO, Zoe Financial  
Kartik Srinivasan, President, Advyzon Institutional  
Moderator: Nancy Gordon, Head of Advisor Growth, BNY Pershing

## 10:15AM - 10:40AM **NETWORKING BREAK**

Partner Exhibits in the Exhibitor Lounge

## 10:40AM - 11:25AM **WHAT'S YOUR BRAND? HOW ELITE FINANCIAL PROFESSIONALS HAVE SOLVED THE RIDDLE OF DIFFERENTIATION**

Rob Montella, Vice President, Business Consultant, First Trust

Most financial professionals know they need a differentiated value proposition—but few have truly defined one. This session explores common branding mistakes, highlights gaps in clarity, and offers practical guidance for crafting a compelling message that becomes the “soundtrack” of a practice.

## 11:25AM - 12:25PM **KEYNOTE ADDRESS: THE FUTURE OF GROWTH IS BELONGING: WHY MOVEMENTS OUTPERFORM PRACTICES**

Dennis Mosely-Williams, Founder & CEO, Dennis Moseley-Williams Strategic Consulting

Performance and service are no longer differentiators—they're expected. Today's clients want alignment, identity, and a sense of belonging. This keynote explores why the firms that win are building movements, not just practices—and how that shift drives deeper relationships and lasting loyalty.

## 12:25PM - 1:25PM **NETWORKING LUNCH**

Exhibitor Lounge: Registration | Lunch | Partner Exhibits

## 1:25PM - 2:10PM **BEYOND THE BUZZWORDS: BUILDING A CULTURE THAT DELIVERS**

Gordon Ross, President, DeVoe & Company

## 2:10PM - 3:10PM **INSIDE SUCCESSION: REAL STORIES AND WHAT ACTUALLY WORKS**

Eric Hehman, CEO, Austin Asset  
More speakers to be announced!

## 3:10PM - 3:40PM **NETWORKING BREAK**

Partner Exhibits in the Exhibitor Lounge

## 3:40PM - 4:10PM **AI IS HERE: HOW RIAS CAN WIN NEXT**

Speaker to be announced!

## 4:30PM - 6:00PM **ONE-ON-ONE EXPERT MEETINGS (PALM PARK BALLROOM) EVENING RECEPTION (PALM PARK FOYER)**

*Friday, May 8*

## 7:30AM - 8:30AM **NETWORKING BREAKFAST**

Exhibitor Lounge: Registration | Breakfast | Partner Exhibits

## 8:30 AM - 9:25AM **KEYNOTE ADDRESS: HUMAN CAPITAL**

Speaker to be announced!

# AGENDA

9:25AM - 10:15AM

## TEAM ADVANTAGE: HOW RIAS WIN WITH TALENT

Chris Bisenius, President, Executive Search - Wealth Management, Trust, & Tax, Windward Recruiting  
Martine Lellis, Executive Managing Partner, M&A Partner Development, Mercer Advisors  
Michael Watling, Partner, Co-Head of Litigation & Investigations, Co-Lead of Asset & Wealth Management Team, Seward & Kissel

Winning with talent goes beyond recruiting. Top firms are focused on developing, motivating, and retaining their people. Join industry experts in recruiting, legal, and RIA leadership as they share what's working now—from smarter hiring to building a high-performance culture.

10:15AM - 10:40AM

## NETWORKING BREAK

Partner Exhibits in the Exhibitor Lounge

10:40AM - 11:10AM

## INCENTIVES THAT FUEL GROWTH

David DeVoe, Founder & CEO, DeVoe & Company

11:10AM - 12:00PM

## 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

Hear directly from lending experts as they share how firms are structuring capital to help G2 and G3 advisors take on ownership and lead the next phase of growth. Walk away with real-world strategies to keep your succession plan moving forward and position your firm for long-term success.

12:00PM - 12:05PM

## CLOSING COMMENTS

DeVoe & Company

*Program Ends at 12:05pm*

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