

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 6th

2:00pm-3:00pm	Afternoon Tea and Networking <i>Sponsored by Franklin Madison</i>	Ballroom Prefunction
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3:00pm	General Session Welcome: Top Directors Deliver for the Financial Institution C-Suite Conversation: Managing Up to Institution Leadership <i>Sponsored by Terrapin Technologies</i> <i>Bill Partin, Former President, Sharonview Credit Union</i>	Ballroom
	Panel: Learning from Other Delivery Channels <i>Paul Haines, Mariner Wealth Advisors</i> <i>Casey Knight, ESP Financial Search</i> <i>Robert Matricardi, The Pelora Group of Mass Mutual</i>	

6:00pm	Reception	<i>Musical Entertainment sponsored by Delaware Life</i>	Ballroom Prefunction
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7:00pm	Dinner <i>Sponsored by Raymond James</i> 2025 Top Directors Awards: Presented by Ameriprise Small Firms: <i>Sponsored by LPL Financial</i> Mid-size Firms: <i>Sponsored by Cetera Financial Institutions</i> Emerging Firms Women-Led Firms Large Firms: <i>Sponsored by The Standard</i> Credit Unions: <i>Sponsored by TruStage</i> Mega Firms: <i>Sponsored by Midwood Financial Services, Inc.</i>	Ballroom
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9:00pm	After Party <i>Sponsored by Asset-Map</i>	Ballroom Prefunction
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Friday, Nov 7th

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