Tiburon CEO Summit LI - Meeting Agenda

October 19-21, 2026 · InterContinental Hotel, Boston, MA

Monday, October 19, 2026 - Welcome Evening

5:00pm - 7:00pm	WELCOME RECEPTION **Welcome Reception Featuring a Bar & Appetizers** Location: InterContinental Hotel, Boston, MA - 3rd Floor, Foyer

Tuesday, October 20, 2026 - Full Day of Sessions

7:00am - 7:45am	Breakfast Buffet - Attendees may bring breakfast to the opening session
7:45am - 8:00am	WELCOME **Tiburon CEO Summit LI Welcome** *Moderator:* **Mark Bruno**, Managing Director, Emigrant Partners
8:00am - 9:00am	PANEL DISCUSSION **Ask the Clients Panel Discussion** Clients: Matt M., Halsey P., Dennis X., Marcia H., Ron K. *Facilitator:* **Darren Tedesco**, President, Advisor360
9:00am - 9:15am	Break
9:15am - 10:15am	KEYNOTE PRESENTATION **Tiburon CEO Summit LI - Keynote Presentation** United States of America Wealth & Investment Management (& WealthTech) Key Trends Presented by Chip Roame, Managing Partner, Tiburon Strategic Advisors Introduced by Mark Bruno, Managing Director, Emigrant Partners
10:15am - 10:30am	Break
10:30am - 12:10pm	TIBURON TALKS **Tiburon Talks: Strategic Views from Wealth & Investment Management Consulting Firms** *Introducer:* **Brian Ross**, CEO, Flyer Financial Technologies *Speaker:* **Sinisa Babcic**, Partner, Wealth Management Business Consulting, Ernst & Young *Speaker:* **Will Kangas**, Partner, Asset & Wealth Management Strategy, PwC *Speaker:* **Bradley Kellum**, Partner, Wealth & Asset Management, Oliver Wyman *Speaker:* **Scott Reddel**, Managing Director, Capital Markets & Wealth Management, Accenture *Speaker:* **Michael Spellacy**, Managing Director, Financial Services Industry, Alvarez & Marsal
12:10pm - 12:35pm	Casual Lunch Break
12:35pm - 1:15pm	DISCUSSION **United States Wealth & Investment Management (& WealthTech) Key Trends: A Broad Discussion Between Tiburon & Leading Strategy Consulting Firm Partners** Facilitated by Chip Roame, Managing Partner, Tiburon Strategic Advisors *Continuing Panelists from Tiburon Talks:* Sinisa Babcic (Ernst & Young), Will Kangas (PwC), Bradley Kellum (Oliver Wyman), Scott Reddel (Accenture), Michael Spellacy (Alvarez & Marsal)
1:15pm - 1:30pm	Break

1:30pm - 1:45pm	FEATURE **Tiburon Impact Adventures** *Speaker:* **Scott Hanson**, Vice Chairman, Allworth Financial *Speaker:* **Sean Lambert**, President, San Diego & Baja, Youth with a Mission *Speaker:* **Giezi Nino**, Campus Director, San Diego & Baja, Youth with a Mission *Speaker:* **Craig Wietz**, President, First Rate
1:45pm - 2:30pm	TIBURON CEO SUMMIT LI AWARD **Tiburon CEO Summit LI Award Presentation** Chip Roame in conversation with Tiburon CEO Summit LI Award Recipient Rick Wurster *Facilitator:* **Chip Roame**, Managing Partner, Tiburon Strategic Advisors *Award Recipient:* **Rick Wurster**, CEO, The Charles Schwab Corporation
2:30pm - 3:45pm	PANEL DISCUSSION **Wealth & Investment Management Firms CEOs Panel Discussion** *Facilitator:* **Amar Ahluwalia**, CEO, OneVest *Panelist:* **Eric Becker**, Co-Chairman, Cresset Capital Management *Panelist:* **Daniel Gamba**, Co-President, Franklin Templeton *Panelist:* **Dan Glaser**, Operating Partner, Clayton, Dubilier, & Rice (CD&R), Chairman, Focus Financial Partners *Panelist:* **Ralph Haberli**, CEO, Edelman Financial Engines *Panelist:* **Tom Walrond**, President, Private Client Group, Raymond James & Associates
3:45pm - 4:00pm	Break
4:00pm - 4:15pm	FEATURE **Skip & Chip's Excellent Adventures** *Speaker:* **Alan Clopine**, Executive Chairperson, Pure Financial Advisors *Speaker:* **Skip Schweiss**, CEO, Sierra Investment Management
4:15pm - 4:55pm	TIBURON TALKS **Tiburon Talks: Strategic & Tactical Views from Trade Group CEOs** *Introducer:* **John Timoni**, Partner, Republic Capital Group *Speaker:* **Dennis Moore**, CEO, Financial Planning Association (FPA) *Speaker:* **Dane Snowden**, CEO, Certified Financial Planner Board of Standards (CFP Board)
6:00pm - 9:30pm	GROUP DINNER **Tiburon CEO Summit LI Group Dinner** Location: Smith & Wollensky, Boston, MA *To Dinner:* Walk - Four minute walk from the InterContinental Hotel *Return to Hotel:* Walk - Four minute walk back to the InterContinental Hotel **6:00 - 9:30pm** Group Dinner including Cocktails and Appetizers

Wednesday, October 21, 2026 - CEO Roundtable Sessions

7:00am - 7:45am	Breakfast Buffet - Attendees should feel free to bring breakfast to the CEO Roundtables

8:00am - 9:00am	CEO ROUNDTABLE SESSIONS **Wealth & Investment Management - Salon I & II** **Comprehensive Financial Planning** *Facilitator:* **Randy Bullard**, Business Head, Investment Management, Hightower Advisors *Panelist:* **Andrew Altfest**, CEO, FP Alpha *Panelist:* **Lauren Clough**, CEO, bQuest *Panelist:* **Jeff Coyle**, CEO, Libretto *Panelist:* **Max Goldman**, CEO, Carefull *Panelist:* **Alex Hargrove**, CEO, Hargrove MSO *Panelist:* **Max Lane**, CEO, Flourish
	Business Building - Salon III **Wealth Management Marketing & Lead Generation Strategies** *Facilitator:* **Jenn Anderson**, Chief Marketing Officer, Hightower Advisors *Panelist:* **Joe Anthony**, President, Gregory *Panelist:* **Rishi Bharathan**, CEO, WiserAdvisor *Panelist:* **Dave Christensen**, CEO, FMG Suite *Panelist:* **Ian Karnell**, CEO, VastAdvisor *Panelist:* **Robert Sofia**, CEO, Snappy Kraken
	Strategic Opportunities - Salon V **WealthTech Venture Capital & Growth Equity Investing** *Facilitator:* **Sunay Shah**, Managing Director, Business Development & Partnerships, OneVest *Panelist:* **Andrew Cedar**, Partner, Long Ridge Equity Partners *Panelist:* **Matt Harris**, Partner, Bain Capital Ventures, Bain Capital *Panelist:* **Dante La Ruffa**, Partner, Venture Capital, Aquiline Capital Partners *Panelist:* **Brian Saunders**, Business Head, United Kingdom & Europe, Atlas Merchant Capital *Panelist:* **Justin Wisz**, Founder, Thicket Ventures
9:00am - 9:15am	Break
9:15am - 10:15am	CEO ROUNDTABLE SESSIONS **Wealth & Investment Management - Salon I & II** **Investment Management Strategies & Products, Including Personalized (Direct) Indexing, Alternative Investments, & Sustainable Investing (ESG)** *Facilitator:* **Brad Kellogg**, Chief Financial Officer, Flyer Financial Technologies *Panelist:* **Michael Bell**, CEO, Meketa Capital *Panelist:* **Carlos Diez**, CEO, MarketGrader *Panelist:* **Matt Radgowski**, CEO, Halo Investing *Panelist:* **Adam Rein**, Co-Founder, CapShift *Panelist:* **Brad Walker**, Co-President, CAIS
	Business Building - Salon III **Leading-Edge B2C Models, Including Challenger Banks, Online Brokerage Firms, Robo Advisors, Hybrid Digital Advice Providers, AI-Centric Firms, & Other Leading-Edge B2C Models** *Facilitator:* **Heather Rosato**, Chief Marketing Officer, DPL Financial Partners *Panelist:* **Cobi Blumenfeld-Gantz**, CEO, Chapter *Panelist:* **Steve Chen**, CEO, Boldin *Panelist:* **Kevin Cimring**, CEO, Ovation Ventures *Panelist:* **Dan Raju**, CEO, Tradier *Panelist:* **David Snider**, CEO, Harness Wealth

	Strategic Opportunities - Salon V **Wealth Management Firms Mergers & Acquisitions** *Facilitator:* **David Lau**, CEO, DPL Financial Partners *Panelist:* **Matt Cooper**, CEO, Beacon Pointe Advisors *Panelist:* **Scott Hanson**, Vice Chairman, Allworth Financial *Panelist:* **Vince Morris**, President, OneDigital *Panelist:* **Channing Olsen**, Chief Operating Officer, Private Client, Wealthspire Advisors *Panelist:* **Ed Walters**, President, World Investment Advisors
10:15am - 10:30am	Break
10:30am - 11:30am	CEO ROUNDTABLE SESSIONS **Wealth & Investment Management - Salon I & II** **Managed Accounts Programs & Turnkey Asset Managed Programs (TAMPs)** *Facilitator:* **Jerry Michael**, President, Smartleaf *Panelist:* **Lee Andreatta**, CEO, Advyzon Investment Management *Panelist:* **Brendan Clark**, CEO, Clark Capital Management Group *Panelist:* **Reed Colley**, President, Orion Advisor Technology, Orion Advisor Solutions *Panelist:* **Karl Roessner**, CEO, Vestmark *Panelist:* **Craig Wietz**, President, First Rate
	Business Building - Salon III **WealthTech Leading-Edge Technology Business Building Solutions: Workflow Technology; CRM, Client Portals, Sales Enablement Technology, Data Management Technology, Automation Technology, & Billing Technology** *Facilitator:* **Tom McCarthy**, Chief Distribution Officer, DPL Financial Partners *Panelist:* **Sean Brown**, CEO, YCharts *Panelist:* **Amy DeTolla**, CEO, Aureus Advantage *Panelist:* **Rob Madej**, CEO, PureFacts Financial Solutions *Panelist:* **Matt Matrisian**, President, Signature Estate and Investment Advisors (SEIA) *Panelist:* **Gaurav Sharma**, CEO, Capitalize
	Strategic Opportunities - Salon V **Private Equity: WealthTech, Wealth Management Firms, & More** *Facilitator:* **Ana Mahony**, CEO, Addition Wealth *Panelist:* **Daniel Brujis**, Managing Director, Reverence Capital Partners *Panelist:* **Adam Halpern-Leistner**, Partner, Hellman & Friedman *Panelist:* **Sid Ramakrishnan**, Managing Director, Genstar Capital *Panelist:* **Rich Rosenbaum**, Chief Investment Officer, Aquiline Capital Partners, Aquiline Holdings *Panelist:* **David Winokur**, Partner, Clayton, Dubilier & Rice
11:30am - 11:45am	Break
11:45am - 12:45pm	CEO ROUNDTABLE SESSIONS **Wealth & Investment Management - Salon I & II** **Independent Advisor Channels & Break-Away Broker Platforms** *Facilitator:* **Kristen Santerian**, Chief Operating Officer, Wealth Business, BlackRock *Panelist:* **Kirk Bell**, President, Raymond James Financial Services, Raymond James Financial *Panelist:* **Ken Hoffman**, President, Optima Group, Dynasty Financial Partners *Panelist:* **Runik Mehrotra**, Co-CEO, Vise Technologies *Panelist:* **Christian Mitchell**, President, Cetera Solutions, Cetera Holdings *Panelist:* **Brad Smithy**, President, Wealth Management, Elevation Point

	Business Building - Salon III **Artificial Intelligence: Opportunities & Risks** *Facilitator:* **Amy Cunningham**, Partner, (DBA Republic Capital Group), Partners Solutions Capital Group *Panelist:* **Peter Dun**, CEO, Feathery *Panelist:* **Alex Goodwin**, CEO, Bridge *Panelist:* **Max Klein**, CEO, LEA Technologies *Panelist:* **Alexandra Mysoor**, CEO, Alix
	Strategic Opportunities - Salon V **WealthTech & Wealth Management Firms Initial Public Offerings (IPOs)** *Facilitator:* **Eric Becker**, Co-Chairman, Cresset Capital Management *Panelist:* **Jeff Brand**, Managing Director, Asset & Wealth Management, Global Investment Banking, Raymond James & Associates *Panelist:* **Pat Fels**, Partner, Americas, Financial Institutions Group, Investment Banking, The Goldman Sachs Group *Panelist:* **Rick Hough**, CEO, Silvercrest Asset Management Group *Panelist:* **Bill Nook**, Managing Director, Moelis & Company *Panelist:* **Jon Stern**, Partner, Berkshire Global Advisors
12:45pm - 1:00pm	Tiburon CEO Summit LI Closing Networking Opportunity
1:00pm	Conclusion

Questions about the meeting agenda? Contact Sarah Sage - ssage@tiburonadvisors.com