

Day 1

Time (ET)	Monday, October 20	Session Type
9:00 a.m. – 6:00 p.m.	Exhibit Hall	Exhibit Hall
10:00 a.m. – 11:30 a.m.	eMoney Leadership, Research, and Roadmap	Mainstage
11:30 a.m. – 12:25 p.m.	Needs Analysis: How to Engage Clients with Ease (1 CFP® CE Credit*)	Fundamental
11:30 a.m. – 12:25 p.m.	Annuities Demystified: Building a Steady Income Stream (1 CFP® CE Credit*)	Master Class
12:30 p.m. – 1:25 p.m.	Driving Engagement and Growth with the Client Portal (1 CFP® CE Credit*)	Fundamental
12:30 p.m. – 1:25 p.m.	Navigating the Complexities of Taxes in Financial Planning (1 CFP® CE Credit*)	Master Class
1:25 p.m. – 2:00 p.m.	Break	
2:00 p.m. – 2:55 p.m.	Sponsor Breakout (Allianz)	Sponsor
2:00 p.m. – 2:55 p.m.	Sponsor Breakout (Wealth.com)	Sponsor
3:00 p.m. – 3:55 p.m.	Keynote Speaker	Mainstage
4:00 p.m. – 4:55 p.m.	Planning for a Golden Future: Social Security and Retirement Essentials (1 CFP® CE Credit*)	Fundamental
4:00 p.m. – 5:30 p.m.	The Complete Financial Picture: A Case Study on Meeting Retirement Income and Income Tax Objectives (1.5 CFP® CE Credits*)	Master Class

* Pending approval

Day 2

Time (ET)	Tuesday, October 21	Session Type
9:00 a.m. – 6:00 p.m.	Exhibit Hall	Exhibit Hall
8:00 a.m. – 10:00 a.m.	CFP Board Code of Ethics and Standards of Conduct (2 CFP® CE Credits*)	Ethics
10:00 a.m. – 10:55 a.m.	Keynote Speaker	Mainstage
11:00 a.m. – 11:55 p.m.	Fidelity Mainstage	Sponsor Mainstage
12:00 p.m. – 12:55 p.m.	Summit Theme Panel	Mainstage
1:00 p.m. – 2:00 p.m.	Networking Lounge	Networking Lounge
2:00 p.m. – 2:55 p.m.	Building a Strong Estate Plan: Key Elements to Protect Your Wealth (1 CFP® CE Credit*)	Fundamental
2:00 p.m. – 2:55 p.m.	The Art of Asking Questions (1 CFP® CE Credit*)	Going Beyond
3:00 p.m. – 3:30 p.m.	Sponsor Breakout (Flourish)	Sponsor
3:00 p.m. – 3:30 p.m.	Sponsor Breakout	Sponsor
3:35 p.m. – 4:25 p.m.	The Power of Monte Carlo: Enhancing Confidence in Your Financial Projection (1 CFP® CE Credit*)	Master Class
3:35 p.m. – 4:25 p.m.	Diving into the Latest Features of eMoney: Now That's What I Call eMoney 2025 (1 CFP® CE Credit*)	Fundamental
4:30 p.m. – 6:30 p.m.	CFP Board Code of Ethics and Standards of Conduct (2 CFP® CE Credits*)	Ethics

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Day 3

Time (ET)	Wednesday, October 22	Session Type
9:00 a.m. – 5:00 p.m.	Exhibit Hall	Exhibit Hall
10:00 a.m. – 10:55 a.m.	Sponsor Panel	Sponsor Mainstage
11:00 a.m. – 11:55 a.m.	The Evolution of Advice: Past Lessons, Present Trends, and the Future of Financial Planning Technology (1 CFP® CE Credit*)	Going Beyond
11:00 a.m. – 11:55 p.m.	Unlock the Full Potential of eMoney: 25 Tips and Tricks to Simplify Your Financial Planning Life (25 in 25) (1 CFP® CE Credit*)	Fundamental
12:00 p.m. – 12:55 p.m.	Elevating Client Experiences: Real-Time, Personalized Tools for Meaningful Financial Decisions (1 CFP® CE Credit*)	Fundamental
12:00 p.m. – 12:55 p.m.	Exploring Life Transitions: Financial Planning for Clients Experiencing Major Change (1 CFP® CE Credit*)	Going Beyond
1:00 p.m. – 1:55 p.m.	Michael Kitces- The Four Factors That Really Drive Adviser Productivity	Mainstage
1:55 p.m. – 2:30 p.m.	Networking Lounge	Networking Lounge
2:30 p.m. – 3:25 p.m.	The Next Level of Estate Planning: Trusts, Tax Strategies, and More (1 CFP® CE Credit*)	Master Class
2:30 p.m. – 3:25 p.m.	Life Insurance for the Future: Planning Today for Peace of Mind Tomorrow (1 CFP® CE Credit*)	Fundamental
3:30 p.m. – 5:00 p.m.	The Complete Financial Picture: A Case Study on Managing Risk and Investments (1.5 CFP® CE Credits*)	Master Class

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