

## Day 1

Time (ET)	Monday, October 20	Session Type
9:00 a.m. – 6:00 p.m.	<b>Exhibit Hall</b>	Exhibit Hall
10:00 a.m. – 11:25 a.m.	<b>eMoney Leadership, Product Vision and Roadmap</b>	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.	(Live) 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.	<b>Networking Break</b>	Networking Lounge
2:00 p.m. – 2:55 p.m.	<b>Allianz   Decumulation Diversification: Hedging Against Potential Health Care Costs</b>	Sponsor
2:00 p.m. – 2:55 p.m.	<b>Wealth.com   Sponsor Session</b>	Sponsor
3:00 p.m. – 3:55 p.m.	<b>(Live) Carl Richards   Reimagining Wealth Through Simple Sketches</b>	Keynote
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

## Day 2

Time (ET)	Tuesday, October 21	Session Type
9:00 a.m. – 6:00 p.m.	<b>Exhibit Hall</b>	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.	<b>Dr. Michelle Rozen   Secrets of Leading Through Change</b>	Keynote
11:00 a.m. – 11:55 p.m.	<b>(Live) Fidelity   Sponsor Session</b>	Sponsor Mainstage
12:00 p.m. – 12:55 p.m.	<b>Summit Theme Panel (1 CFP® CE Credit)</b>	Mainstage
1:00 p.m. – 1:30 p.m.	<b>Mili   Sponsor Session</b>	Sponsor
1:30 p.m. – 2:00 p.m.	<b>Networking Break</b>	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.	<b>Flourish   Sponsor Session</b>	Sponsor
3:00 p.m. – 3:30 p.m.	<b>Zocks   AI in Action: Practical Tips for eMoney Users</b>	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	Fundamental
4:30 p.m. – 6:30 p.m.	CFP Board Code of Ethics and Standards of Conduct (2 CFP® CE Credits)	Ethics

## Day 3

Time (ET)	Wednesday, October 22	Session Type
9:00 a.m. – 5:00 p.m.	<b>Exhibit Hall</b>	Exhibit Hall
9:30 a.m. – 10:00 a.m.	<b>Panel   Shaping the Future of Advice: Talent, Tools, and Skills for the Next Generation</b>	Mainstage
10:00 a.m. – 10:55 a.m.	<b>Mili   Sponsor Session (1 CFP® CE Credit*)</b>	Sponsor
10:00 a.m. – 10:55 a.m.	<b>Vanilla   Sponsor Session</b>	Sponsor
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.	<b>Michael Kitces   The Four Factors That Really Drive Adviser Productivity (1 CFP® CE Credit)</b>	Mainstage
1:55 p.m. – 2:30 p.m.	<b>Networking Lounge w/Michael Kitces</b>	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
3:30 p.m. – 4:25 p.m.	<b>Nationwide   Sponsor Session</b>	Sponsor