eMoney Summit
TOMORROW'S PLANNING, TODAY.

Schedule

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. – 11:25 a.m.	**eMoney Leadership, Product Vision 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.	(Live) Driving Engagement and Growth with the Client Portal (1 CFP® CE Credit)	Fundamental
12:30 p.m. – 1:25 p.m.	Making Tax Planning Clear and Actionable in eMoney (1 CFP® CE Credit)	Master Class
1:25 p.m. – 2:00 p.m.	**Networking Break**	Networking Lounge
2:00 p.m. – 2:55 p.m.	**Allianz | Decumulation Diversification: Hedging Against Potential Health Care Costs**	Sponsor
2:00 p.m. – 2:55 p.m.	**Wealth.com | The Why Behind Estate Planning**	Sponsor
3:00 p.m. – 3:55 p.m.	**(Live) Carl Richards | Reimagining Wealth Through Simple Sketches**	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

Schedule

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.	**Dr. Michelle Rozen | Secrets of Leading Through Change**	Keynote
11:00 a.m. – 11:55 p.m.	**(Live) Fidelity | Advisor as CEO: Bridging Goals and Strategy with Bonds**	Sponsor Mainstage
12:00 p.m. – 12:55 p.m.	**Summit Theme Panel (1 CFP® CE Credit)**	Mainstage
1:00 p.m. – 1:30 p.m.	**Mili | eMoney and Enterprise AI Workflows**	Sponsor
1:30 p.m. – 2:00 p.m.	**Networking Break**	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.	**Flourish | Bring Held-away Cash into Your Orbit Using eMoney**	Sponsor
3:00 p.m. – 3:30 p.m.	**Zocks | AI in Action: Practical Tips for eMoney Users**	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

eMoney Summit
TOMORROW'S PLANNING, TODAY.

Schedule

Day 3

Time (ET)	Wednesday, October 22	Session Type
9:00 a.m. – 5:00 p.m.	**Exhibit Hall**	Exhibit Hall
9:30 a.m. - 10:00 a.m.	**Panel | Shaping the Future of Advice: Talent, Tools, and Skills for the Next Generation**	Mainstage
10:00 a.m. - 10:55 a.m.	**Mili | Building the AI-enabled Advice Firm: Leadership Perspectives (1 CFP® CE Credit)**	Sponsor
10:00 a.m. - 10:55 a.m.	**(LIVE) Vanilla | Basis and Beyond Estate Planning for Non-taxable Estates**	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.	**Michael Kitces | The Four Factors That Really Drive Advicer Productivity (1 CFP® CE Credit)**	Mainstage
1:55 p.m. - 2:30 p.m.	**Networking Lounge w/Michael Kitces**	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.	**Nationwide | Total Retirement Income Planning**	Sponsor