eMoney Summit | POWERING WHAT'S POSSIBLE

DAY 1 AGENDA

Time (ET)	Monday, October 19	Session Type
9:00 a.m. – 6:00 p.m.	**Exhibit Hall**	**Exhibit Hall**
10:00 a.m. – 10:45 a.m.	**eMoney Leadership and Product Vision**	**Mainstage**
10:45 a.m. – 11:45 a.m.	**Panel Discussion**	**Mainstage**
11:45 a.m. – 12:10 p.m.	Break	Exhibit Hall
12:15 p.m. – 1:10 p.m.	Driving Smarter Planning Outcomes with Decision Center and CoPlanner (1 CFP® CE Credit*)	Foundations
12:15 p.m. – 1:10 p.m.	Stock Options: Turning Equity Compensation into Better Planning Conversations (1 CFP® CE Credit*)	Advanced Strategies
1:15 p.m. – 2:10 p.m.	Using Client Portals to Enhance Financial Planning Engagement and the Client Experience (1 CFP® CE Credit*)	Foundations
1:15 p.m. – 2:10 p.m.	Tax Analysis and Planning with eMoney (1 CFP® CE Credit*)	Advanced Strategies
2:10 p.m. – 2:25 p.m.	Break	Exhibit Hall
2:30 p.m. – 3:25 p.m.	**Sponsor Breakout Sessions**	**Sponsor**
3:30 p.m. – 4:30 p.m.	**Keynote Speaker**	**Mainstage**
4:30 p.m. – 4:55 p.m.	Break	Exhibit Hall
5:00 p.m. – 6:30 p.m.	Complete Financial Picture: Business Succession, Retirement, and Legacy Case Study (1.5 CFP® CE Credits*)	Advanced Strategies

** Pending approval*

Exhibit Hall | Mainstage | Sponsors & Networking | Break

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DAY 2 AGENDA

Time (ET)	Tuesday, October 20	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.	Retirement Planning with Confidence: Leveraging Social Security (1 CFP® CE Credit*)	Foundations
10:00 a.m. – 10:55 a.m.	The Power of Monte Carlo: Uncovering Possibilities (1 CFP® CE Credit*)	Advanced Strategies
11:00 a.m. – 11:55 a.m.	Establishing a Legacy: Introduction to Estate Planning (1 CFP® CE Credit*)	Foundations
11:00 a.m. – 11:55 a.m.	Building a Lasting Legacy: Advanced Trust Planning (1 CFP® CE Credit*)	Advanced Strategies
11:55 a.m. – 12:25 p.m.	Break	Exhibit Hall
12:30 p.m. – 1:25 p.m.	**Fidelity Sponsor Session**	**Mainstage**
1:30 p.m. – 2:30 p.m.	**Networking Session**	**Networking Lounge**
2:30 p.m. - 2:55 p.m.	Break	Exhibit Hall
3:00 p.m. – 3:30 p.m.	**Sponsor Breakout Sessions**	**Sponsor**
3:35 p.m. – 4:30 p.m.	New eMoney Features from the Last Year	Foundations
3:35 p.m. – 4:30 p.m.	Planning Beyond the Unexpected: Safeguarding Clients' Futures with Insurance (1 CFP® CE Credit*)	Advanced Strategies
4:30 p.m. – 4:55 p.m.	Break	Exhibit Hall
5:00 p.m. – 7:00 p.m.	CFP Board Code of Ethics and Standards of Conduct (2 CFP® CE Credits)	Ethics

** Pending approval*

Exhibit Hall | Mainstage | Sponsors & Networking | Break

DAY 3 AGENDA

Time (ET)	Wednesday, October 21	Session Type
9:00 a.m. – 5:00 p.m.	**Exhibit Hall**	**Exhibit Hall**
10:00 a.m. – 10:55 a.m.	Building Better Client Outcomes: A Modern Needs Analysis Framework for Today's Advisor (1 CFP® CE Credit*)	Foundations
10:00 a.m. – 10:55 a.m.	Getting the Most out of eMoney Annuity Functionalities (1 CFP® CE Credit*)	Advanced Strategies
11:00 a.m. – 11:55 a.m.	Foundational Planning: A Structured Approach to Financial Plans (1 CFP® CE Credit*)	Foundations
11:00 a.m. – 11:55 a.m.	Three Meetings, One Platform: A Smarter Way to Deliver Financial Planning (1 CFP® CE Credit*)	Foundations
11:55 a.m. – 12:25 p.m.	Break	Exhibit Hall
12:30 p.m. – 1:25 p.m.	**Sponsor Breakout Sessions**	**Sponsor**
1:30 p.m. – 2:30 p.m.	**Keynote Speaker**	**Mainstage**
2:35 p.m. – 3:30 p.m.	**Panel Discussion**	**Mainstage**
3:30 p.m. – 3:55 p.m.	Break	Exhibit Hall
4:00 p.m. – 4:55 p.m.	Leveraging eMoney for More Effective Financial Planning (1 CFP® CE Credit*)	Foundations
4:00 p.m. – 4:55 p.m.	The Planning Lifecycle: Matching the Right Tools to the Right Clients, from Needs Analysis to Advanced Planning (1 CFP® CE Credit*)	Foundations
5:00 p.m. – 6:30 p.m.	Powering What's Possible: A Case Study on Maximizing Executive Wealth and Equity Compensation (1.5 CFP® CE Credits*)	Advanced Strategies

** Pending approval*

Exhibit Hall | Mainstage | Sponsors & Networking | Break