

2026 SMART CONFERENCE

MAY 27 WEDNESDAY

10:30 AM – THE BASICS: TRAINING
FOR NEW(ER) ADVISORS
4:30 PM
*Lunch will be served
during the training*

**5:00 PM/
6:00 PM** COCKTAILS/DINNER
Black Cow Fat Pig

LOCATIONS

McMill Building – Conference Sessions
125 S 4th St

Black Cow Fat Pig – Wednesday Evening
702 W Norfolk Ave

Divots Downtown – Thursday Lunch
206 W Norfolk Ave

The Cove (Midtown) – Thursday Evening
1102 Riverside Blvd

Norfolk Lodge & Suites – Hotel Block
4200 W Norfolk Ave

WEALTH MANAGEMENT
A REGISTERED INVESTMENT ADVISOR



MAY 28 THURSDAY

8:00 AM – BREAKFAST & SOCIAL
TIME
8:30 AM

8:30 AM WELCOME

8:45 AM – PHILLIP KOONTZ
Former Navy Seal
10:00 AM
Overcoming Adversity

10:15 AM – STEVE CURRAN
Charles Schwab
12:00 PM
*Managing Growth by
Increasing Effectiveness*

12:00 PM – LUNCH
1:30 PM
Divots Downtown

1:30 PM – WESTON WELLINGTON
3:00 PM
Dimensional Fund Advisors

3:00 PM – NATE RAABE
4:00 PM
Monthly WM Topic LIVE!

**5:00 PM/
6:00 PM** COCKTAILS/DINNER
Midtown Event Center

MAY 29 FRIDAY

8:00 AM – BREAKFAST & SOCIAL
TIME
8:30 AM

8:30 AM WELCOME

8:40 AM – BEN HENRY-MORELAND
Kitces Speaking Team
10:30 AM
*Tax Planning Opportunities
Under The OBBBA*
2.0 IAR CE Credits – Products & Practice

10:45 AM – JEFF KINNEY
11:30 AM
Cantor Fitzgerald

11:30 AM CLOSING REMARKS

11:45 AM LUNCH
To Stay or To Go

SPONSORS

 **Dimensional**

 **CANTOR
Fitzgerald**

 **Broadridge**