

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/ COCKTAILS/DINNER
6:00 PM *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*
1.5 IAR CE Credits – Products & Practice

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/ COCKTAILS/DINNER
6:00 PM *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**

RETIREMENT
PLAN CONSULTANTS LLC

AN INTEGRITY COMPANY

 **Broadridge**