

BRIAN SULLIVAN | Founder, Peak Performance Advisor Consulting

- **Organic Growth Strategies** — Advisors are losing assets to death, divorce, and retirement distributions. Learn five proactive ways to engage clients and prospects to drive organic growth.
- **Effective Time Management** — Most advisors want to add head count when their practice grows. Before adding to your team, conduct a time study to ensure your team is maximizing productivity and clearly aligned on roles and responsibilities.

JEFF LANZA | Former FBI agent and Cybersecurity Expert

- **Simple Safeguards: How to Stay Safe From Cyber Crime and Identity Theft** — A practical look at the most common digital threats facing advisors and their clients, with straightforward, high-impact protections you can implement immediately to reduce risk and build trust.
- **Cybercrime Prevention for Business: How to Stay Safe Against the Growing Threat** — A clear look at today's evolving cyber risks facing businesses and their clients, with practical, ready-to-implement strategies to strengthen defenses and reduce exposure.
- **Protecting the Generations: How to Keep Your Family Safe from Fraud** — This program helps financial advisors understand evolving fraud risks affecting every generation—from children to aging parents—and provides actionable strategies families can use to stay vigilant, reduce exposure, and protect long-term financial security.

BILL CUPACH | Focus Founder, Focus First Consulting

- **The 4 C's of Organizational Success** — Culture, Communication, Career Pathing, and Compensation are the four pillars of strong teams. Learn how building a framework around each creates teams positioned to win, grow, and thrive long term.
- **Creating a Culture of Accountability** — No matter your stage in your advisor journey, client acquisition and retention drive practice growth. Using principles from *The 4 Disciplines of Execution* or the EOS® System, learn how to turn annual goals into focused activities that produce measurable results for advisors and staff.
- **Maximizing the Value of Your Firm** — Headlines tout 6–10x multiples, but what actually drives practice valuations? Learn the key factors that increase value, the common detractors, and why a true succession plan is very different from a "death plan."

MARK GHERITY | Financial Coach and Supernova Trainer

- **From Capacity to Breakaway Growth: The Supernova Advisor Models** — Most advisors don't have a growth problem, but a capacity and focus problem. Learn how top performers redesign roles, decision-making, and client engagement to achieve sustained, breakaway growth—without working more hours.
- **Client Experience as a Growth Engine: Turning Relationships into Referrals** — Growth happens when the client experience is intentionally designed. Learn how elite teams use Supernova strategies to simplify their value, deepen engagement, and generate referrals through clarity, consistency, and proactive communication.
- **Stop Doing More: The Discipline of Focused Growth** — Advisors stall when they chase too many ideas. Learn how high-performing teams use Supernova discipline to eliminate distractions, focus on high-impact activities, and drive predictable growth by doing less—better.

DON CONNELLY | Financial Advisor Coach, Don Connelly & Associates LLC

- **Emotional Security: The Foundation of Client Retention** — Clients rarely leave because of performance; they leave when they feel uncertain or unheard. This session shows how advisors build emotional security through clarity, calm communication, and trust-building conversations that strengthen retention and deepen long-term relationships.
- **From Knowledge to Clarity: Improving Client Understanding and Confidence** — Most advisors know more than they need to explain. This session shows how simplifying language, avoiding the "curse of knowledge," and using clear framing helps clients understand recommendations, feel more confident, and make better decisions.
- **Advisor Leadership in Volatile Markets** — Market volatility tests more than portfolios — it tests leadership. This session explores how effective advisors guide client behavior through uncertainty with reassurance, perspective, and disciplined communication that prevents reactive decisions and protects long-term plans.

CRAIG KIRKPATRICK | Optimal Advisor AI

- **Practical AI Use Cases for Advisors** — Most advisors don't need more tools; they need clear ways to use AI in daily work. Learn simple workflows for client emails, meeting prep, and follow-up.
- **Making AI Sound Like Your Own Voice** — Generic AI responses feel impersonal. Learn how to shape AI output so it matches your tone and stays professional, personal, and client ready.
- **AI for Business Development and Referrals** — Learn how advisors use AI to identify new prospects, prepare for client and prospect meetings, and respond to common client objections without adding hours.