



Uncommon Knowledge 2025

Sunday, May 4

11:30 AM Golf Tournament – course TBA
12:00 PM Pickleball – Westin South Coast Plaza
4:00 – 6:00 PM Solo Advisor Meeting
7:00 PM NAAIM Welcome Party

Monday, May 5

7:00 – 8:30 AM NAAIM Board Meeting
7:30 – 8:30 AM New Member Welcome Orientation & Breakfast
7:30 AM Registration | Sponsor Hall Opens
8:30 AM **Welcome** – Barry Arnold, NAAIM President
8:45 – 9:45 AM **Owning Hard Choices: Risk has a real cost again** -Tony Nash, Complete Intelligence
9:45 – 11:00 AM **Successful Succession Planning** - Mark Delfino, Vice Chair and Steve Taddie, Director, Focus Partners | Wealth
11:00 – 11:30 AM Refreshment Break – Sponsor Hall
11:30 – 12:30 PM **30 Ideas in 30 Minutes: Your Marketing Wins & Lessons** – Join an interactive open mic session where attendees share real-world marketing successes and missteps—fast-paced, insightful, and full of inspiration.
12:30 – 1:45 PM Lunch and Sponsor Introductions
1:45 – 3:00 PM **How to Avoid Being Sued, Publicly Shamed, and Losing Clients: Cybersecurity for Investment Advisors** - John Siggard, Superior Technical Solutions
3:00 - 3:45 PM **Gold Sponsor Breakouts**
A. Trendrating
B. Rex Shares
3:45 – 4:15 PM Refreshment Break
4:15 – 5:15 PM **NAAIM Exchange LIVE!** Experience our monthly get togethers live. Bring a chart or favorite indicator to share in this session - Moderator: Barry Arnold
5:15 – 5:45 PM Break before evening event
5:45– 9:00 PM **Platinum Sponsor Hosted Event** – Meet in the Hotel Lobby. City Cruises – Newport Beach. Dinner excursion on The Wildgoose (previous owner - John Wayne).

Tuesday, May 6

7:30 – 8:30 AM Continental Breakfast – Sponsor Hall
8:30 - 9:30 AM **AI Revolution in Active Management: From Theory to Practice** – Tal Schwartz, Ph.D., Founder & CEO, AI Funds, Inc.
9:30 – 10:45 AM **0 to \$100M in <2.5 years: Using planning, technology, and process to attract and retain clients** – Mark Cecchini, Director, Wealth Solutions, Quadrant Capital

10:45 – 11:15 AM	Refreshment Break – Sponsor Hall
11:15– 12:15 PM	Portfolio Management Using Relative Strength - Zoe Bollinger, CFP, Bollinger Capital Management
12:15– 1:45 PM	Lunch / Annual membership meeting
1:45 – 3:00 PM	What the Heck is going on with the SEC? Navigating Regulatory Shifts in a Changing Landscape - Leila Shaver, Founder, The RIA Lawyer
3:00 – 3:45 PM	Gold Sponsor Breakouts A. Cyber Resilience for RIAs: Protecting Clients, Assets, and Your Business - Raghu Valipireddy, Chief Information Security Office, AXOS Advisor Services B. Kingsview Investment Management
3:45: 4:15 PM	Refreshment Break – Sponsor Hall
4:15 – 5:45 PM	NAAIM Round Tables (Two 40-minute segments). Topics: 1. a. Quantitative & Technical Trading – Moderator: Zoe Bollinger b. Custodians – Moderator: Josh Kneller c. Financial Planning – Moderator: Laura Redfern 2. a. Marketing b. AI In Your Practice – Moderator: Tal Schwartz c. Technology – Moderator: Jacob Dechenes
6:30 – 9:00 PM	NAAIM All Conference Event – Dinner and Cornhole Tournament

Wednesday, May 7

7:30 – 8:30 AM	Continental Breakfast – Sponsor Hall –
8:30 - 9:30 AM	Trend-Emotion-Timing - Oliver Reiss, Ph.D, Managing Director, Tremti GmbH and 2025 1 st Place Founders Award Winner.
9:30 – 10:30 AM	Investing in a World of a Few Good (Or Not So Good) Men - Peter Atwater, President, Financial Insyghts
10:30 – 11:00 AM	Refreshment Break – Sponsor Hall
11:00 – 12:00 PM	How Individual Stock Selection Generates Alpha Over Passive Index Benchmarks - NAAIM Member Panel: Asher Rogovy, Magnifina; Jim Lee, StratFI; Jim Bernstein, QEX Asset Management. Moderator: Jacob Deschenes, Era Capital Management
12:00 – 1:00 PM	Closing Lunch
1:00 PM	Conference Ends