



## Uncommon Knowledge 2026 – Tampa Westin Waterside

### Sunday, April 26

10:30 AM	Golf Tournament – Westchase Golf Club
12:00 PM	Pickleball – Lifetime Fitness
4:00 – 6:00 PM	Solo Advisor Meeting - <b>Conch</b>
7:00 PM	NAAIM Welcome Party – <b>Channel Side Terrace</b>

### Monday, April 27

7:00 – 8:30 AM	NAAIM Board Meeting - <b>Conch</b>
7:30 – 8:30 AM	New Member Welcome Orientation & Breakfast - <b>Sunset</b>
7:30 AM	Registration   Sponsor Hall Opens - <b>Oasis II</b>
8:30 AM	<b>Welcome</b> – Barry Arnold, NAAIM President - <b>Oasis I</b>
8:45 – 9:45 AM	<b>Watch and Listen: Market Signals in a Noisy World</b> - Paul Hickey, Founder, Bespoke Investment Group, LLC – <b>Oasis I</b>
9:45 – 11:00 AM	<b>How to Get USED By AI: The Counterintuitive Strategy for Staying Indispensable</b> - Draye Redfern, Founder & Ambassador of Buzz, Redfern Media – <b>Oasis I</b>
11:00 – 11:30 AM	Refreshment Break – Sponsor Hall – <b>Oasis II</b>
11:30 – 12:30 PM	<b>How to Make the Most of a Messy Market</b> - Steve Strazza, Director of Research, All Star Charts – <b>Oasis I</b>
12:30 – 1:45 PM	Lunch and Sponsor Introductions – <b>Channel Side Terrace</b>
1:45 – 3:00 PM	<b>RIA Tech Trends - Compliance Implications for Use of AI, Bitcoin, and Electronic Communications</b> - Joe Antonakakis, Esq., Stark & Stark Attorney’s at Law – <b>Oasis I</b>
3:00 - 3:45 PM	<b>Gold Sponsor Breakouts</b> <b>A. Trade in Either “Direxion”:</b> Navigating Energy Volatility and Cross-Market Ripple Effects – Ed Egilinsky, Managing Director, Direxion - <b>Conch</b> <b>B. From Noise to Signal: Harnessing Micro-Alphas for Adaptive Market Exposure</b> – Petra Bakasova, CEO, Hull Tactical - <b>Sunset</b>
3:45 – 4:15 PM	Refreshment Break – Sponsor Hall – <b>Oasis II</b>
4:15 – 5:15 PM	<b>Secrets of Success, A Guide for Buyers, Sellers and Everything In-Between -</b> David Grau Jr., Founder & CEO, Succession Resource Group – <b>Oasis I</b>
5:15 – 6:15 PM	Break before evening event
6:15 – 9:00 PM	<b>Platinum Sponsor Hosted Event</b> - Columbia Restaurant – <b>Meet in Hotel Lobby for Bus</b>

## **Tuesday, April 28**

7:30 – 8:30 AM	Continental Breakfast – Sponsor Hall – <b>Oasis II</b>
8:30 - 9:30 AM	<b>Investing Ahead of Unusual Midterm Elections</b> - Ed Clissold, CFA, Chief US Strategist, Ned Davis Research – <b>Oasis I</b>
9:30 – 10:45 AM	<b>Warning Signs: When Macro Forces Weigh on Stocks</b> - Dean Christians, Founder and Lead Market Strategist, Turning Point Research – <b>Oasis I</b>
10:45 – 11:15 AM	Refreshment Break – Sponsor Hall – <b>Oasis II</b>
11:15– 12:15 PM	<b>Beyond Compliance: Using GIPS® to Strengthen Your Investment Process</b> - Matthew Deatherage, Partner, Longs Peak Advisory Services – <b>Oasis I</b>
12:15– 1:45 PM	Lunch / Annual membership meeting – <b>Channel Side Terrace</b>
1:45 – 3:00 PM	<b>How I Built My RIA From Scratch Making Every Mistake Imaginable</b> – Paul Schatz, President, Heritage Capital LLC – <b>Oasis I</b>
3:00 – 3:45 PM	<b>Gold Sponsor Breakouts</b>
	<b>A. Fireside Chat with Axos &amp; Friends: How the Liberty Technology platform creates advantages for you and your clients</b> – Ryan Moeller, Custody Solutions, Axos Advisory Services - <b>Conch</b>
	<b>B. Income Investing Strategies Under the Current Market Environment</b> – Jay Hatfield, CEO, Infrastructure Capital Advisors, LLC - <b>Sunset</b>
3:45: 4:15 PM	Refreshment Break – Sponsor Hall
4:15 – 5:45 PM	<b>NAAIM Round Tables</b> (Two 40-minute segments) – <b>Sunset &amp; Conch</b>
	<b>Session I:</b> Technical Trading: Moderator – Chad Henry Custodians: Moderator – Barry Arnold Marketing with AI: Moderator - Draye Redfern
	<b>Session II:</b> Technical Trading: Moderator – Rob Hanna Marketing: Moderator - Rich Davila Crypto: Moderator – Brian Kasal
6:30 – 9:00 PM	<b>NAAIM All Conference Event</b> – Dinner and Cornhole Tournament – <b>Channelside Terrace</b>

## **Wednesday, April 29**

7:30 – 8:30 AM	Continental Breakfast – Sponsor Hall – Oasis II
8:30 - 9:30 AM	<b>Stationary, But Not Profitable? A Critical Look at Pairs Trading</b> – Davide Pandini, Ph.D, 2026 1 <sup>st</sup> Place Founders Award Winner – <b>Oasis I</b>
9:30 – 10:30 AM	<b>Tales from the Trenches: Surviving a Compliance Audit</b> - Moderator – Whitney Ribbens, Chicago Wealth Management, Inc. – <b>Oasis I</b>
10:30 – 11:00 AM	Refreshment Break – Sponsor Hall – <b>Oasis II</b>
11:00 – 12:00 PM	<b>The Evolution of the Advisory Firm: Incorporating Financial Planning – NAAIM Member Panel:</b> Branden DuCharme, Ducharme Wealth Management; Brad Hartman, Hartman Financial Planning. Moderator – Laura Redfern, Shadowridge Asset Management – <b>Oasis I</b>
12:00 – 1:00 PM	Closing Lunch – <b>Channel Side Terrace</b>
1:00 - 4:00 PM	<b>A NASAA IAR CE Series on Ethics and Professional Responsibility:</b> Earn up to 3 credit hours of NASAA IAR CE credit fulfilling the category of Ethics & Professional Responsibility. – <b>Oasis I</b>
	A. Fiduciary Duties and Client-First Principals
	B. Identifying and Mitigating Conflicts of Interest
	C. Ethical Communication and Business Practices
4:00 PM	Conference Adjourns