NATIONAL ASSOCIATION OF ACTIVE INVESTMENT MANAGERS

AGENDA
OUTLOOK 2026 | October 26 & 27
Westin DFWNA

Sunday, October 25

3:00 – 6 PM	**NASAA IAR CE Credit – 3 Hours**: Ryan Redfern, President, Shadowridge Asset Management, LLC.
6:00 PM	NAAIM Board Meeting
7:30 PM	**Meet in Hotel Lounge** for a nightcap and your first drink is on NAAIM!

Monday, October 26

7:30 AM	**Registration** – Breakfast in the Sponsor Hall
8:30 AM	Welcome – Ron Rough, NAAIM President
8:45 AM	**Henrietta Treyz,** Co-Founder, Director of Economic Policy, Veda Partners
9:45 AM	**The 80/20 Manifesto: The Power of Disproportionate Returns** - David Leo, Founder, Street Smart Research Group, LLC
10:45 AM	Refreshment Break
11:15 AM	**NAAIM Member Panel – Using AI for Investment Research and Modeling:** Rob Hanna, Capital Advisors 360
12:15 PM	Lunch - Sponsor Introductions
1:15 PM	**Danielle DiMartino Booth,** CEO and Chief Strategist, QI Research
2:15 PM	**Leila Shaver,** Founder and Compliance Nerd, My RIA Lawyer
3:15 PM	Refreshment Break
3:45 – 5:15 PM	**NAAIM Member Round Tables:** Informal concurrent discussions **Session #1 Topics:** Marketing; Custodians; Technical Analysis/Trading **Session #2 Topics:** Technical Analysis/Trading; Software Tools Used in Your Practice
6:00– 9:00 PM	**NAAIM Evening Event**

Tuesday, October 27

7:30 AM	Breakfast in the Sponsor Hall
8:30 AM	**Helene Meisler,** Contributor, The Street Pro
9:30 AM	**Ryan Redfern,** President, Shadowridge Asset Management, LLC
10:30 AM	Refreshment Break
11:00 AM	**Chad Henry,** ForthRight Financial Planning
12:00 PM	Lunch **–** Roundtable Summaries
1:00 PM	**NAAIM Member Panel -** Using AI for Marketing, Compliance, Note Taking and Other Business Practices
2:00 PM	Refreshment Break
2:30 PM	**NAAIM Exchange Live**
4:05 PM	**Conference Adjourns**