



Sunday, October 25

- 3:00 – 6 PM **NASAA IAR CE Credit – 3 Hours:** Ryan Redfern, President, Shadowridge Asset Management, LLC. (Free with conference registration)
- 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 **Midterm Madness – Eight Days Out: Positioning into November & Beyond** - 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 **AI for Research, Modeling, and Business Automation** - Rob Hanna, Capital Advisors 360
- 12:15 PM Lunch - Sponsor Introductions
- 1:15 PM **Are Bessent and Warsh Wearing the Same Team Jersey?** - Danielle DiMartino Booth, CEO and Chief Strategist, QI Research
- 2:15 PM **You can automate the task. You own the fiduciary duty.** - 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:**
- a. **Marketing** – David Leo, Moderator
 - b. **Custodians** – Josh Kneller, Moderator
 - c. **Fed Action and The Economy** – Danielle DiMartino Booth, Moderator
- Session #2 Topics:**
- a. **Technical Analysis/Trading** – Jim Bernstein, Moderator
 - b. **Software Tools Used in Your Practice**- Jacob Dechesnes, Moderator
 - c. **Using AI in Your Practice** – Colby Cantrell and Rob Bernstein, Moderators
- 6:00– 9:00 PM **NAAIM Evening Event – At Fault Dallas Sports Bar (Pickleball is available)**

Tuesday, October 27

- 7:30 AM Breakfast in the Sponsor Hall
- 8:30 AM **The State of the Market** - Helene Meisler, Contributor, The Street Pro
- 9:30 AM **From \$7 Million to \$130 Million: What NAAIM and AI Helped Me Accomplish** - Ryan Redfern, President, Shadowridge Asset Management, LLC
- 10:30 AM Refreshment Break
- 11:00 AM **Working with an AI Assistant** - 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** – Colby Cantrell, Retirement Specialist Central Ohio; . Chris Miller, South Pointe Advisors; and Rich Davila, ProfitScore Capital Management, LLC
- 2:00 PM Refreshment Break
- 2:30 PM **NAAIM Exchange Live – Barry Arnold**
- 4:00 PM **Conference Adjourns**