

Wednesday, October 23rd

8:00 AM	8:00 AM - 1:00 PM	Attendee Check-In & Help Desk Level 2, Summit Foyer
9:00 AM	9:00 AM - 9:30 AM	● Summit Success 101: Your Pre-Conference Guide to Maximizing Your Experience Level 2, Grand Hall C
	9:00 AM - 11:00 AM	● CFP Board Ethics: Enhancing Your Ethical Intelligence (2.0 CFP CE) Level 3, Lionel Bonnie Kirchner
	9:00 AM - 12:00 PM	● Fearless Women's Summit (3.0 CFP CE) Level 2, Interchange Females & Finance
	9:00 AM - 12:00 PM	● Holistiplan Tax Planning Journey (3.0 CFP CE) Level 2, Grand Hall AB
10:00 AM	10:00 AM - 10:50 AM	● Inside-Out Marketing: Building a Brand Message That's Compelling to Prospects & 100% True to You (1.0 CFP CE) Level 3, Golden Eagle B Mary Kate Gulick
	10:00 AM - 10:50 AM	● Alternative Health Insurance Options & Their Risks (1.0 CFP CE) Level 2, Grand Hall C Christine Simone
	10:00 AM - 10:50 AM	● Make Compliance Your Business GROWTH Department: How to Take Advantage of the New Marketing Rule (1.0 CFP CE) Level 4, Railhead Tracie Behr
11:00 AM	11:00 AM - 11:50 AM	● Elevating Advisor Wellbeing (1.0 CFP CE) Level 2, Grand Hall C Dr. Joy Lere
	11:00 AM - 11:50 AM	● Estate Planning for the Mass Affluent: How to Get Beneficiary Designations Right and Estate Plans Completed (1.0 CFP CE) Level 3, Golden Eagle A Mike Bennett, Matt Morris
	11:00 AM - 11:50 AM	● The Overlooked Gap in Financial Advice: Why and How Providing Guidance on Property and Casualty Insurance Can Help Clients and Advisors (1.0 CFP CE) Level 4, Railhead Meaghan Dowd, Dan Jones
12:00 PM	12:00 PM - 12:30 PM	● Summit Success 101: Your Pre-Conference Guide to Maximizing Your Experience Level 4, Railhead Nitrogen
	12:00 PM - 12:50 PM	● Holistic Wealth Leadership: Empowering Clients and Advisors Through Meaning and Technology (1.0 CFP CE) Level 2, Grand Hall C Derek Notman, Adam Holt
	12:00 PM - 12:50 PM	● IRRESISTIBLE: How to Attract Your Perfect Clients & Convert Them in 3 Meetings or Less (1.0 CFP CE) Level 3, Golden Eagle A Francesca McLin

	12:00 PM - 6:00 PM	Partner Marketplace Opens Level 2, Partner Marketplace
1:00 PM	1:00 PM - 1:15 PM	● Summit Opening Remarks Level 4, Main Stage Dan Zitting
1:15 PM	1:15 PM - 2:00 PM	● All it Takes is a Goal Level 4, Main Stage Jon Acuff
2:00 PM	2:00 PM - 2:45 PM	● Growth Through Innovation: The Advisor's Guide Level 4, Main Stage Craig Iskowitz, Abby Salameh, Jamie Hopkins, Drew Seelig
2:45 PM	2:45 PM - 3:30 PM	● The Soul of Wealth (.5 CFP CE) Level 4, Main Stage Dr. Daniel Crosby
3:00 PM	3:00 PM - 4:00 PM	Spouse Activity: Gentle Flow Yoga Level 3, Golden Pass Alexandra Falconio
3:30 PM	3:30 PM - 6:00 PM	● Nitrogen Central Opens Level 2, Grand Foyer
3:45 PM	3:45 PM - 4:15 PM	● Hidden Levers for Advisor Growth Level 3, Golden Eagle A Altruist
	3:45 PM - 4:15 PM	● Break Boundaries. Empower Growth. Maximize Value. Level 3, Golden Eagle B Pinnacle Group
	3:45 PM - 4:15 PM	● Leveraging Tech for Estate Planning: Serving Mass Affluent and High-Net-Worth Clients Level 2, Grand Hall A FP Alpha
	3:45 PM - 4:15 PM	● Lower Risk, Raise GPA - The Case for ACTIVE Strategies for Income & Risk Management Level 2, Grand Hall B Swan Global
	3:45 PM - 4:15 PM	● The Netflixification and Turbo Taxification of Investment Management Level 2, Interchange Syntax Data
	3:45 PM - 4:15 PM	● Tech to Visualize Wealth Distribution: Using Asset Diagrams to Show "Who Gets What" Level 4, Platform C Holistiplan
	3:45 PM - 4:15 PM	● How to Double Your Growth with Seminars Level 2, Grand Hall C AcquireUp
4:30 PM	4:30 PM - 5:00 PM	● Supercharge Your RIA Ops and Growth with Data Insights >> Part 1: Portfolio Management Level 2, Grand Hall C AdvisorEngine
	4:30 PM - 5:00 PM	● Changing the Way We View Long Term Care Level 2, Interchange Producers Choice Network
	4:30 PM - 5:00 PM	● Protecting Your AUM and Your Clients Level 3, Golden Eagle A Highland Capital

	4:30 PM - 5:00 PM	● Stress Testing Retirement Income to Create Fearless Retirement Experiences Level 3, Golden Eagle B IncomeLab
	4:30 PM - 5:00 PM	● Leveraging Tax Planning as a Differentiator for Your Firm - Presenting the 2.0 Tax Report Level 4, Platform C Holistiplan
	4:30 PM - 5:00 PM	● The Personalized Future: Integration and Innovation in Client Experience Level 2, Grand Hall B TradePMR
	4:30 PM - 5:00 PM	● See Why Advisors Love Wealthbox CRM Level 2, Grand Hall A WealthBox
5:10 PM	5:10 PM - 6:00 PM	● Bringing the PALM Advantage to Your Practice Level 2, Grand Hall B Bonsai
	5:10 PM - 5:45 PM	● Empowering Advisors With Personalized Investing through Direct Indexing Level 2, Grand Hall C Alphathena
	5:10 PM - 5:40 PM	● Elite Insights: Tactics and Strategies from Top Advisors Using Nitrogen Level 2, Grand Hall A Glen Jackson, Domenick D'Andrea, and Nitrogen
	5:10 PM - 5:40 PM	● Mastering Client Communications With Nitrogen's Reports Builder & Check-Ins Level 3, Golden Eagle B Nitrogen
	5:10 PM - 5:40 PM	● Maximizing Client Outcomes: A Deep Dive into Roth Conversions, IRA Distributions, and QCDs Level 4, Platform C Holistiplan
	5:10 PM - 5:40 PM	● Nitrogen 101: Key Features and Benefits Level 3, Golden Eagle A Nitrogen
	5:10 PM - 5:40 PM	● Maximizing Client Engagement With Nitrogen's Latest Updates Level 2, Interchange Nitrogen
6:30 PM	6:30 PM - 9:00 PM	The Nitrogen & Jump Opening Night Party at the Skydeck Assembly Food Hall Rooftop 5055 Broadway, Nashville, TN 37203 Please wear your conference badge for entry to the opening party. Buses will run between the Grand Hyatt and Skydeck from 6:00pm - 9:00pm, or enjoy a 7-minute stroll (0.3 miles) down Broadway!
9:00 PM	9:00 PM - 11:00 PM	Nightcap Networking Lobby Bar

Thursday, October 24th

- Nitrogen Breakout
- Main Stage Session
- Partner Breakout
- CFP Session

7:00 AM	7:00 AM - 9:00 AM	Attendee Breakfast Sponsored by Artha Level 2, Grand Foyer
7:30 AM	7:30 AM - 8:00 AM	● Ask Us Anything: Nitrogen Coaching Team Level 2, Grand Hall B Nitrogen
	7:30 AM - 8:00 AM	● Behavioral Finance in Action: How Nitrogen Powers Client Engagement Level 3, Golden Eagle A Yohance Harrison & Nitrogen
	7:30 AM - 8:00 AM	● Engage, Convert, Retain: Mastering Advisor Marketing With Nitrogen Level 3, Lionel Nitrogen
	7:30 AM - 8:00 AM	● Nitrogen 101: Key Features and Benefits Level 2, Grand Hall C Nitrogen
	7:30 AM - 8:00 AM	● Nitrogen 201: Beyond the Basics Level 2, Grand Hall A Nitrogen
8:00 AM	8:00 AM - 8:50 AM	● More Stocks, Same Risk Number (1.0 CFP CE) Level 4, Railhead Aptus Capital Advisors
8:15 AM	8:15 AM - 8:45 AM	● Risk Mitigation Using Allianz & Nitrogen Level 2, Grand Hall C Allianz
	8:15 AM - 8:45 AM	● Practical Advisor AI: Slash Meeting Admin Time by 90% + Elevate Client Experience Level 3, Golden Eagle A Jump AI
	8:15 AM - 8:45 AM	● Fuel Your Firm's Growth Level 3, Golden Eagle B Orion
	8:15 AM - 8:45 AM	● Seeking Strong Fixed Income for Your Clients? Level 2, Grand Hall B yRefy
9:00 AM	9:00 AM - 10:00 AM	Spouse Activity: Gentle Flow Yoga Level 3, Golden Pass Alexandra Falconio
	9:00 AM - 9:30 AM	● Five Keys to Winning the Next Decade in Wealth Management (.5 CFP CE) Level 4, Main Stage Aaron Klein
9:30 AM	9:30 AM - 10:10 AM	● Client-Centric Growth: Scaling Engagement and Satisfaction (.5 CFP CE) Level 4, Main Stage Tina Powell, Jon Patullo, Bill Simonet, Andrew Altfest
10:10 AM	10:10 AM - 10:50 AM	● The SOUL of Organic Growth (.5 CFP CE) Level 4, Main Stage Joe Duran & Tricia Rothschild

11:00 AM	11:00 AM - 12:00 PM	● The Nitrogen Keynote  Level 4, Main Stage
12:00 PM	12:00 PM - 12:30 PM	Book Signing: “Center Stage: How to Become the Star of Your Practice” Level 2, Partner Marketplace: Book Signing Table
	12:00 PM - 1:00 PM	FinServ Student Meet & Greet Level 2, Partner Marketplace: Showcase 2
	12:00 PM - 1:15 PM	Attendee Lunch Sponsored by TradePMR Level 2, Grand Foyer
	12:00 PM - 1:30 PM	ReThink. The Financial Advisor Podcast Live Recording Level 2, Partner Marketplace
12:15 PM	12:15 PM - 12:30 PM	● TradePMR Showcase Level 2, Partner Marketplace: Showcase 1
12:30 PM	12:30 PM - 12:45 PM	● FP Alpha Showcase Level 2, Partner Marketplace: Showcase 1
12:45 PM	12:45 PM - 1:00 PM	● yRefy Showcase Level 2, Partner Marketplace: Showcase 1
1:00 PM	1:00 PM - 1:15 PM	● AcquireUp Showcase Level 2, Partner Marketplace: Showcase 1
1:30 PM	1:30 PM - 1:45 PM	● Quick Wins: Transformative Marketing Strategies Level 4, Main Stage Samantha Russell
1:45 PM	1:45 PM - 2:00 PM	● CEO Notes: Engaging (and Winning) Next-Gen Clients Level 4, Main Stage Rich Cancro
2:00 PM	2:00 PM - 2:15 PM	● Quick Wins: TaxStatus Level 4, Main Stage Kevin Knull
2:15 PM	2:15 PM - 2:30 PM	● Quick Wins: yRefy Level 4, Main Stage Laine Schoneberger
2:30 PM	2:30 PM - 2:45 PM	● Inspired Growth: The Secret to Explosive Engagement and Success Level 4, Main Stage Dr. Joy Lere
3:00 PM	3:00 PM - 3:30 PM	● Supercharge Your RIA Ops and Growth With Data Insights >> Part II: CRM Level 2, Grand Hall C AdvisorEngine
	3:00 PM - 3:30 PM	● Bull or Bear? Tools to Survive and Thrive in Uncertain Markets Level 2, Interchange AlphaDroid
	3:00 PM - 3:30 PM	● Eliminating the Barriers to Obtaining IRS Tax Data for Double-Digit Organic Growth and Enhanced Client Outcomes Level 2, Grand Hall A TaxStatus
	3:00 PM - 3:30 PM	● Harnessing the Power of Nitrogen and Schwab’s Third-Party Technology Integration Level 2, Grand Hall B Charles Schwab

	3:00 PM - 3:30 PM	● Powerful Prospecting: Become Their Trusted Advisor Before the First Meeting Level 3, Golden Eagle A FMT Solutions
	3:00 PM - 3:30 PM	● Taking the “Stack” Out of Your Tech Stack: The Benefits of a Comprehensive Solution Level 3, Golden Eagle B Advyzon
	3:00 PM - 3:30 PM	● The Advisor’s Guide to Estate Maintenance: Keeping Plans Updated and Relevant Level 4, Platform C Holistiplan
3:40 PM	3:40 PM - 4:10 PM	● The Growing High-Net-Worth Practice (.5 CFP CE) Level 2, Grand Hall C BlackRock
	3:40 PM - 4:10 PM	● Competitive Advantage of Open Architecture Level 2, Grand Hall A United Planners
	3:40 PM - 4:10 PM	● Building Trust and Retention: The Power of Financial Education in Client Engagement Level 3, Golden Eagle B Enrich Educated Investor
	3:40 PM - 4:10 PM	● How to Use Prospect and Client Data to Power Growth Level 3, Golden Eagle A Catchlight
	3:40 PM - 4:10 PM	● Nature: Our Most Precious Asset - A Forests to Fortune Perspective Level 4, Railhead Forests of Fortune
	3:40 PM - 4:10 PM	● Scaling Tax Planning at Your Firm: Effective Delegation Strategies to Add More Value to Your Clients Level 4, Platform C Holistiplan
	3:40 PM - 4:10 PM	● The Biggest Marketing Opportunities for 2025 - And How to Start Capitalizing On Them Today Level 2, Grand Hall B FMG Suite
4:20 PM	4:20 PM - 4:50 PM	● Advanced Tax Planning Techniques: Real-World Applications Level 4, Platform C Holistiplan
	4:20 PM - 4:50 PM	● The Model Practice Level 3, Golden Eagle B Invesco
	4:20 PM - 4:50 PM	● The Personalized Future: Integration and Innovation in Client Experience Level 2, Grand Hall B TradePMR
	4:20 PM - 4:50 PM	● Zero to a Billion: Key Insights to Drive Growth and Efficiency Level 3, Golden Eagle A AdvisorCRM
	4:20 PM - 4:50 PM	● Seeking Strong Fixed Income for Your Clients? Level 2, Grand Hall A yRefy
	4:20 PM - 5:20 PM	● WealthTech Roadmap Level 2, Grand Hall C Asset-Map & Holistiplan
	4:20 PM - 4:50 PM	● Bridging Generations Critical Strategies for Managing the “Peak 65” and Their Heirs in 2025 Level 4, Railhead SS&C

5:00 PM	5:00 PM - 5:30 PM	● Benchmarking Strategic Priorities for Emerging RIAs in 2024 (.5 CFP CE) Level 4, Railhead Lisa Asher
	5:00 PM - 5:30 PM	● From Prospects to Partners: Leveraging Nitrogen for Client Acquisition and Retention Level 3, Golden Eagle B Glen Jackson
	5:00 PM - 5:30 PM	● Implementing Estate Planning to Future Proof Your Practice Level 3, Lionel Trust & Will
	5:00 PM - 5:30 PM	● Nitrogen 301: Expert Techniques Level 2, Grand Hall A Nitrogen
	5:00 PM - 5:30 PM	● Social Media Strategies for Wealth Management: Leveraging Online Platforms to Enhance Client Engagement and Grow Your Financial Advisory Business Level 2, Interchange Domenick D'Andrea
	5:00 PM - 5:30 PM	● Tech on Tap: Inside Nitrogen's R&D Level 3, Golden Eagle A Nitrogen
	5:00 PM - 6:00 PM	● Exit Planning for Advisors: How to Build a Business Around M&A for Small Business Owners (1.0 CFP CE) Level 2, Grand Hall B Bill Simonet
	5:00 PM - 7:00 PM	AdvisorEngine Happy Hour Level 2, Partner Marketplace
5:30 PM	5:30 PM - 6:00 PM	● Nitrogen 201: Beyond the Basics Level 2, Grand Hall C Nitrogen
6:45 PM	6:45 PM - 8:15 PM	Dinner Summit Ballroom
8:15 PM	8:15 PM - 9:00 PM	● Comedy Show ft. Dusty Slay Level 4, Main Stage
9:00 PM	9:00 PM - 11:45 PM	Nightcap Networking Lobby Bar

Friday, October 25th

- Nitrogen Breakout
- Main Stage Session
- Partner Breakout
- CFP Session

7:00 AM	7:00 AM - 9:00 AM	Breakfast Grand Hall Foyer
	7:30 AM - 8:00 AM	● Building Unicorns: Proven Strategies and Tactics From Billion-Dollar Companies to Elevate Your Practice Level 2, Interchange Nitrogen
	7:30 AM - 8:00 AM	● Hiring for Your Firm: Creative Recruiting Strategies in Any Job Market Level 3, Golden Eagle B Nitrogen
	7:30 AM - 8:00 AM	● Mastering Client Communications With Nitrogen's Reports Builder & Check-Ins Level 3, Golden Eagle A Nitrogen
	7:30 AM - 8:00 AM	● Next-Level Lead Gen: Leveraging Nitrogen as a Competitive Advantage Level 2, Grand Hall C Nitrogen
	7:30 AM - 8:00 AM	● Maximizing Client Engagement With Nitrogen's Latest Updates Level 2, Grand Hall B Nitrogen
	7:30 AM - 8:00 AM	● Town Hall With the Nitrogen CEO Level 2, Grand Hall A Dan Zitting
8:10 AM	8:10 AM - 8:40 AM	● Ask Us Anything: Nitrogen Coaching Team Level 2, Grand Hall C Nitrogen
	8:10 AM - 8:40 AM	● Behavioral Finance in Action: How Nitrogen Powers Client Engagement Level 2, Grand Hall B Yohance Harrison & Nitrogen
	8:10 AM - 8:40 AM	● Nitrogen 301: Expert Techniques Level 2, Grand Hall A Nitrogen
	8:10 AM - 8:40 AM	● Revenue Growth Unlocked: Strategies & Metrics for Financial Advisors Level 3, Golden Eagle A Nitrogen
	8:10 AM - 8:40 AM	● To Succeed in Business, Start by Knowing Yourself: Proof and Steps to Achieve It (.5 CFP CE) Level 4, Railhead Julie Johnson & Justin Castelli
	8:10 AM - 8:40 AM	● Engage, Convert, Retain: Mastering the Advisor Marketing Kit Level 3, Golden Eagle B Nitrogen
9:00 AM	9:00 AM - 9:40 AM	● A Championship Vision Level 4, Main Stage Emmitt Smith
9:40 AM	9:40 AM - 10:30 AM	● Scaling Advice: From Financial Advisor to Financial Adviser (1.0 CFP CE) Level 4, Main Stage Michael Kitces
10:30 AM	10:30 AM - 10:45 AM	● 2024 Fearless Investing Summit Recap Level 4, Main Stage Dan Zitting
11:00 AM	11:00 AM - 11:30 AM	● Hiring for Your Firm: Creative Recruiting Strategies In Any Job Market Level 3, Golden Eagle B Nitrogen

	11:00 AM - 11:30 AM	● Practice Management Using Nitrogen for Advisors and for Teams Level 3, Golden Eagle A Nitrogen
	11:00 AM - 11:30 AM	● Revenue Growth Unlocked: Strategies & Metrics for Financial Advisors Level 4, Railhead Nitrogen
	11:00 AM - 11:30 AM	● Town Hall With the Nitrogen CEO Level 2, Grand Hall C Dan Zitting
	11:00 AM - 11:30 AM	● Next Steps: Turning Summit Insights Into Action Level 2, Grand Hall A Nitrogen
11:30 AM	11:30 AM - 1:00 PM	Closing Lunch Level 2, Grand Foyer

Session Recordings

All main stage sessions will be recorded and made available for on-demand viewing after the Summit. Keep an eye on your inbox—links to the recordings will be emailed to you post-event!

CFP® Continuing Education

To receive CFP® CE credit, please make sure to sign in at each eligible session you attend, as the check-in form serves as your record for accreditation. After the session, the instructor will submit the forms, and once verified, your hours will be submitted within two weeks. If you need any assistance, feel free to reach out to events@nitrogenwealth.com.