

**10:30 AM Tuesday Morning Breakout Sessions:**

<i>Sales & Distribution</i>	<i>Sales Enablement Integration</i> - Discover how to unite your sales processes, tools, and data into one powerful enablement engine. Learn proven strategies for aligning sales teams with marketing, streamlining workflows, and empowering wholesalers to finding their next client.
<i>Marketing</i>	<i>Content Creation and Curation w/ AI</i> - From drafting fresh ideas to curating high-quality industry insights, AI is transforming how marketers deliver content. Explore cutting-edge AI tools and workflows that can help you create, repurpose, and personalize content at scale.
<i>Data, Tech & AI</i>	<i>Dashboards Best Practices</i> - A great dashboard isn't just pretty—it's powerful. Learn how firms are designing dashboards that actually drive decisions, reduce noise, and bring clarity to complex data. Gain tips on visualization, interactivity, and storytelling.

2:15 PM Tuesday Afternoon Breakout Sessions:

<i>Sales & Distribution</i>	<i>Institutional Distribution Challenges</i> - Institutional sales is a different game. From compliance hurdles to multi-stakeholder decision-making, explore real-world challenges—and practical solutions—for successfully navigating this high-value sales channel.
<i>Marketing</i>	<i>Products & Relationships</i> - Product launches aren't just about features— they're about trust. Discover techniques for positioning products effectively while building deep, long-term client relationships that drive repeat business.
<i>Data, Tech & AI</i>	<i>Client Segmentation Strategies</i> - One-size-fits-all marketing is dead. Learn how to segment clients intelligently—using behavioral, demographic, and predictive data—to deliver targeted experiences that resonate and convert.
<i>Solutions Workshop</i>	<i>(Kyloe) – Break Out of the Cell: How Much Excel is Too Much?</i> Excel is powerful, but it has its limits. This session explores when it's time to move beyond spreadsheets to specialized tools that can streamline operations and eliminate inefficiencies.

9:45AM Wednesday Morning Breakout Sessions:

<i>Sales & Distribution</i>	<i>Mobile CRM – Success Stories</i> - See how top firms are using mobile CRM solutions to drive productivity on the go. Learn from real-world examples of how sales teams close deals faster, collaborate better, and never miss a client touchpoint.
<i>Marketing</i>	<i>Marketing Technology Key Solutions to Drive Activity</i> - From automation to analytics, explore the marketing technology stack that's fueling engagement and revenue growth. Learn which tools deliver the biggest ROI and how to integrate them for maximum impact.
<i>Data, Tech & AI</i>	<i>AI to Enhance the Customer Experience</i> - Explore how AI is redefining customer experience—from intelligent chatbots to predictive service models—and learn how to implement these tools without losing the human touch.
<i>Solutions Workshop</i>	<i>(HSO) AI Agents in Action: How to Move from Use Case to MVP</i> - This is an interactive session—expect to share, ask questions, and walk away with tools to bring your C-suite a well-framed proposal or proof of concept. We'll also share how HSO is helping firms test AI Agent pilots at no cost through our beta offer.

1:45 PM: Wednesday Afternoon Breakout Sessions:

<i>Sales & Distribution</i>	<i>Harvesting Sales and Marketing Activity</i> - Don't let valuable activity go to waste. Learn how to capture, track, and leverage sales and marketing interactions to uncover new opportunities and measure impact.
<i>Marketing</i>	<i>Driving Activity for the RIA Channel</i> - Independent advisors require a unique marketing approach. Discover how to craft messaging, events, and campaigns that resonate with RIAs and generate meaningful engagement.
<i>Data, Tech & AI</i>	<i>Personalization of Sales Using AI</i> - AI can make every client interaction feel personal. Discover how to leverage data and AI models to tailor recommendations, anticipate needs, and create a sales experience that feels one-to-one at scale.
<i>Solutions Workshop</i>	<i>(Synfinii) From Resistance to Resilience: Leading People Thru Disruption</i> This session will tackle the people challenges at the heart of change management, especially in firms where adoption is historically slow. Attendees will explore how asset managers are evolving from rigid, high-cost structures to more agile, high-ROI operations—and how leadership can make or break that transition.