# 2026 SPEAKERS AND SESSIONS

## Jonathan Bauman *1 Hour Approved CE Session*

### *Exploring AI's Transformative Potential*

This session provides an overview of artificial intelligence, including the evolution of AI and the rise of generative AI. It explores practical opportunities and use cases alongside key challenges and unintended consequences. Attendees will also gain insight into current debates, future developments, and the organizations and industries most likely to enable and benefit from these technologies.

## Brian Gillette *1 Hour Approved Ethics Session*

### *Your Ethos is Always on Trial*

This 1-hour session explores how professional credibility drives client trust and business outcomes in financial services. Using a framework of competence, character, and caring, participants gain practical strategies to navigate complex conversations, strengthen relationships, and meet regulatory expectations.

## Marcia Mantell *1 Hour Approved CE Session*

### *2026 Social Security Updates & Options for Solvency*

This session examines the current outlook for Social Security, including recent projections on reserve depletion and the growing concerns facing clients. It explores potential policy solutions Congress may consider and highlights how financial advisors can help clients navigate uncertainty, stay on track, and plan confidently around this critical source of retirement income.

## Wade Pfau *1 Hour Approved CE Session*

### *Determining Your Client's Retirement Income Styles*

This session explores how retirement planning is shifting toward sustainable income and the growing risks retirees face, including longevity, market volatility, and sequence of returns. It highlights how advisors can apply a range of income strategies aligned to client preferences to improve risk management and client satisfaction.

# 2026 BREAKOUT SESSIONS

## Marcia Mantell

***1 Hour Approved CE Session***

### *Connecting the Dots between Social Security and Medicare*

This hands-on walkthrough follows a married couple with a significant gap between spouses' Primary Insurance Amounts, with one spouse eligible for spousal benefits. We'll review the basics and determine the ideal claiming strategy based on current cash flow, lifetime benefits, and survivor benefits. We'll also examine how claiming Social Security impacts Medicare Parts A and B, including differences for spouses working at large versus small companies. In addition, we'll discuss how to evaluate the implications when one spouse contributes to an HSA.

## Kevin Hansen

## Ben Totel

### *Washington DC Update: The OBBBA, SECURE Acts, and More*

Join us for a discussion about the planning opportunities with the One Big Beautiful Bill Act, SECURE Acts, and beyond. We'll provide details on the key rules and regulations changes from the recent legislation.

***1 Hour Approved CE Session***

**ADDITIONAL SPEAKERS WILL BE ANNOUNCED SOON. STAY TUNED FOR MORE EXCITING UPDATES TO OUR LINEUP!**