



## Ensemble Leaders' Summit Agenda

### MONDAY, SEPTEMBER 22

**3:30 p.m.** – Registration Opens

**5:30 p.m.** – Reception

**6:30 p.m.** – Dinner

**Registration, Reception & Dinner in the Grand Ballroom**

**Guest Speaker: Ashley Adamson**

Emmy-Winning Broadcaster | Big Ten Network Host

Co-Founder Tamber.co | Your Mom™ Podcast

### TUESDAY, SEPTEMBER 23

**7:00 a.m.** – Breakfast

**Breakfast at the Salon and Terrace**

(Summit held in the Grand Ballroom)

**7:45 a.m.** – Opening Comments

**Ray Sclafani, CEO and Founder, ClientWise**

- Frame the purpose of the Summit and the expected outcomes.
- Set the tone for collaboration and applied learning.

**8:00 a.m. – 8:50 a.m.**

**Accelerating RIA Success: Market Trends, Transaction Insights and Growth Tools**

**David DeVoe, CEO and Founder, DeVoe & Company**

- Understand current M&A trends and firm valuation dynamics.
- Position your firm for sustainable, long-term enterprise value growth.

**8:55 a.m. – 9:45 a.m.**

**Rumbling In The Jungle 22 Months Later**

**Mark Hurley, CEO, Digital Privacy & Protection**

- Analyze disruptive forces reshaping the advisory profession.
- Challenge assumptions about client acquisition, pricing, and profitability.

**9:55 a.m. – 10:20 a.m.**

**BREAK**

**10:20 a.m. – 11:05 a.m.**

**Wealth Update**

**Bonnie Tomczak, CPA, CEO & President, Northwestern Mutual Wealth Management Company**

- The Wealth Management Company Roadmap.

**11:05 a.m. – 11:55 p.m.**

**Built to Break? What Elite Firms Get Wrong**

**Brian Hamburger, Founder, MarketCounsel and The Hamburger Law Firm**

- Why generic agreements and “borrowed” strategies often fail high-performing teams.
- How to spot warning signs in equity, buy-sell, and ownership agreements.
- The most common missteps in internal succession planning.
- What great exit planning really looks like and why it must start at inception.
- How governance design enables firms to preserve value and scale smarter.



## TUESDAY, SEPTEMBER 23 — CONTINUED

11:55 a.m. – 12:55 a.m.

Lunch at Kita

1:00 p.m. – 1:45 p.m.

**The Freedom Paradox**

**John Diehl, Senior Vice President, Hartford Funds – MIT Agelab**

- Retirement often promises freedom but leaves many unfulfilled. The missing ingredients are *matter*ing, feeling valued, and adding value.
- The five Aspects of Mattering
- Your Psychological Portfolio

1:45 p.m. – 2:35 p.m.

**Structuring Practice Equity for Growth-Oriented Ensembles**

**John Furey, Founder and Managing Partner, Advisor Growth Strategies**

- Benchmark against elite RIAs using top-tier operating data.
- Apply insights to optimize profitability, scale, and client service.

2:35 p.m. – 3:20 p.m.

**Capital Group's Pathways to Growth**

**Leah Ryan, VP and Advisor Practice Management Consultant, Capital Group**

**Ross Junge & Gina Cunningham, McGill Junge Wealth Management**

- Pathways to Growth Research Program Results.
- National Advisor Benchmark.
- Six Pathways Steps.

3:20 p.m. – 3:40 p.m.

**BREAK**

3:40 p.m. – 4:20 p.m.

**A Cautionary Tale: The Challenges of Serving the UHNW Client Segment**

**Jamie McLaughlin, CEO, J.H. McLaughlin & Co.**

- Understand UHNW and centimillionaire families truly demand beyond portfolio management.
- Reframe the "family office" narrative around integration, not imitation.
- Reengineer profitability in UHNW client service using core vs. adjacent models.
- Scale without losing intimacy by leveraging ensemble models.
- Architect firms for sustainability with capital, governance, and ownership alignment.

4:20 p.m. – 4:30 p.m.

**Wrap-Up**

**Ray Sclafani, CEO and Founder, ClientWise**

6:30 p.m. – Reception

**Reception & Dinner in the Grand Ballroom**

7:00 p.m. – Dinner



## WEDNESDAY, SEPTEMBER 24

<b>7:00 a.m.</b> – Breakfast	<b>Breakfast at the Salon and Terrace</b> (Summit held in the Grand Ballroom)
<b>7:45 a.m.</b> – Opening Comments	<b>Ray Sclafani, CEO and Founder, ClientWise</b>
<b>8:00 a.m. – 8:50 a.m.</b> <b>M&amp;A and Scale – What’s Next for Insurance Networks</b>	<b>Rich Gill, Co-Founder, Wealth Partners Capital Group</b> <ul style="list-style-type: none"><li>• Explore private equity’s evolving role in wealth management.</li><li>• Identify opportunities and pitfalls in equity partnerships.</li></ul>
<b>8:55 a.m. – 9:45 a.m.</b>	<b>Liz Nesvold, Vice Chair, Emigrant Bank   Chair, Emigrant Partners</b> <ul style="list-style-type: none"><li>• Gain perspective on deal structures and capital strategies for ensembles.</li><li>• Understand when to bring in professional management to maximize value.</li></ul>
<b>9:50 a.m. – 10:40 a.m.</b> <b>Session with NM Leaders</b>	<b>John Roberts, Executive Vice President and Chief Field Officer</b> <b>Matt Plocher, VP Field Leadership &amp; Performance, Northwestern Mutual</b> <ul style="list-style-type: none"><li>• Learn how Northwestern Mutual is evolving its support for ensembles.</li><li>• Explore firm-level opportunities for scaling client experience and growth.</li></ul>
<b>10:40 a.m. – 11:00 a.m.</b>	<b>BREAK</b>
<b>11:00 a.m. – 11:50 a.m.</b> <b>Finley Point Strategy LLC prepared for ClientWise</b>	<b>David Canter, Founder and CEO, Finley Point Strategy LLC</b> <ul style="list-style-type: none"><li>• Learn strategies for advisor and leadership development at scale.</li><li>• Explore how firms are institutionalizing growth and talent management.</li></ul>
<b>12:00 p.m. – 1:00 p.m.</b>	<b>Lunch at Kita</b>
<b>1:00 p.m. – 1:45 p.m.</b> <b>Asset Acquisition Playbook: Strengthening Client Relationships and Driving Business Growth</b>	<b>Barry Motz, Managing Director and Senior Relationship Manager, Lord Abbett</b> <ul style="list-style-type: none"><li>• Expand growth opportunities.</li><li>• Reposition idle assets.</li><li>• Elevate your value proposition.</li></ul>
<b>1:45 p.m. – 2:35 p.m.</b> <b>Signed, Sealed, Simplified: Making Legal Agreements Work for You</b>	<b>John Watkins, Partner, Reitler Kailas &amp; Rosenblatt LLC</b> <b>Scott Sparks, President and CEO, Sparks Financial</b> <ul style="list-style-type: none"><li>• Understand how enduring culture drives sustained growth.</li><li>• Leverage leadership practices to transition from founder-driven to institutional firms.</li></ul>
<b>2:35 p.m. – 3:20 p.m.</b> <b>Teams to the Fore: Best Practices &amp; Winning Ideas From the Barron’s Wealth Management Rankings</b>	<b>Matt Barthel, Executive Director, Dow Jones Wealth and Asset Management Group &amp; Barron’s Magazine</b> <ul style="list-style-type: none"><li>• Examine Barron’s Advisor data to see what separates elite ensembles.</li><li>• Identify actionable growth strategies top firms are executing today.</li></ul>
<b>3:20 p.m. – 3:30 p.m.</b> <b>Closing Reflections</b>	<b>Ray Sclafani, Founder &amp; CEO, ClientWise LLC</b> <ul style="list-style-type: none"><li>• Recap key themes from the Summit / Adjourn at 3:30</li></ul>

