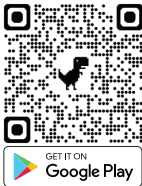




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MONDAY, NOVEMBER 10			
12:00–1:00 pm	Cheetah Training Lunch in Agave		
12:00–1:00 pm	Operations Committee Lunch in Joshua Tree		
1:00–4:00 pm	Cheetah Training in Agave		
1:00–4:00 pm	Operations Committee Meeting in Joshua Tree		
5:00–6:00 pm	Prospect Reception in Santa Rita		
6:00–9:00 pm	Welcome Reception for all Hunt attendees in Sundance Café: food, games and event sponsored by AssetMark, beverages sponsored by Broadridge		
TUESDAY, NOVEMBER 11			
8:00–9:00 am	Breakfast in Presidio I-IV: sponsored by R&T Deposit Solutions		
9:00–9:15 am	Welcome in Turquoise I-II		
9:15–9:30 am	Sponsor Introductions, Janet Moore , Strategic Alliances + RFP Manager in Turquoise I-II		
9:30–10:30 am	Cheetah State of the Union, Adam Unger , CEO, Accutech Systems in Turquoise I-II		
10:30–11:00 am	Break: sponsored by Cheetah		
11:00 am–12:00 pm	Entrusted: Building a Legacy That Lasts*, David York Esq. + CPA , York Howell (1.25 CTFA) in Turquoise I-II		
12:00–1:00 pm	Lunch in Presidio I-IV: sponsored by CAPIS		
1:00–2:00 pm	Eight Rules You Were Born to Break, Special Guest in Turquoise I-II		
2:00–2:30 pm	Break: sponsored by Cheetah		
2:30–3:30 pm	Executive Track	Investment Track	Operations Track
	Five Marketing Mistakes Trust Organizations Can't Afford to Make*, Brandon Coppernoll , Managing Director, Intersection (1.25 CFMP) in Presidio V	Adapt, Change or Disappear: New Tools and a New Mindset for a Changing Marketplace*, David York, Esq. + CPA , York Howell (1.25 CTFA) in Joshua Tree	Managing the Will File: Maximizing Future Fee Business*, Michael Dixon , Pohl Consulting and Training, Inc. (1.25 CTFA + 1.25 ATOP) in Turquoise I-II
3:30–4:30 pm	Executive Track	Investment Track	Operations Track
	The Digital Advantage: Scaling Self-Service Planning to Deepen Client Engagement and Capture Generational Wealth Pat Spencer , Moneytree in Joshua Tree	Next Level Investing: Unlocking Enhanced Functionality in Cheetah*, Shane Pond and Dallas Bergman , Solutions Consultants, and Matt Garrett , Product Manager, Cheetah (1.25 CTFA) in Presidio V	Name & Address Records: Not Just For Tax IDs and Addresses*, Kelly Waugh , Wealth Management Consultant, Cheetah, and Jerry Gillespie , Team Lead, Wealth Management Consultant, Cheetah (1.25 CTFA + 1.25 ATOP) in Turquoise I-II
6:00–8:00 pm	Dinner at Last Territory: food sponsored by Orion, beverages sponsored by Fifth Third Bank		
6:45–9:45 pm	Live Music Performed by North at Last Territory: sponsored by First Rate		
WEDNESDAY, NOVEMBER 12			
7:30–8:30 am	Breakfast in Presidio I-IV: sponsored by NewEdge Institutional Trading		
8:30–9:30 am	Market Update*, Christian Chan , AssetMark (1.25 CTFA + 1.25 ATOP) in Turquoise I-II		
9:30–10:00 am	Break: sponsored by Cheetah		
10:00–11:00 am	Harnessing Artificial Intelligence Responsibly in Trust Organizations*, John O'Connell , CEO & Founder, The Oasis Group (1.25 CTFA, 1.25 ATOP + CERP) in Turquoise I-II		
11:00 am–12:00 pm	Executive Track	Investment Track	Operations Track
	You Need To Be "Comfortable Being Uncomfortable.*" Jerry Michael , Co-founder and President, Smartleaf (1.25 CTFA) in Presidio V	Alternative Investments: An Overview and Portfolio Integration*, Alex Urbani , President + Head of Revenue, Mainstreet Advisors (1.25 CTFA) in Joshua Tree	IRA Survival Guide - Manage your IRAs so They Don't Manage You*, Kelly Waugh , Wealth Management Consultant, Cheetah and Jerry Gillespie , Team Lead, Wealth Management Consultant, Cheetah (1.25 CTFA, 1.25 ATOP + CISP) in Turquoise I-II
12:00–1:00 pm	Lunch in Presidio I-IV: sponsored by MainStreet Advisors		
1:00–2:00 pm	Executive Track	Investment Track	Operations Track
	Identifying, Attracting, and Retaining Profitable Clients: Finding Them and How to Keep Them*, Michael Dixon , Pohl Consulting & Training (1.25 CTFA) in Presidio V	Beyond the Sweep: Rethinking Liquidity and Client Value in a Dynamic Rate Environment*, Jack Giannini , VP Product Manager, R&T (1.25 CTFA) in Joshua Tree	Exploring New Possibilities with Enhanced Features*, Cole Horton , Product Manager and Team Lead, Trust Solutions, Cheetah (1.25 CTFA + 0.75 ATOP) in Turquoise I-II
2:00–3:00 pm	The Hidden Power of Segmentation: Boost Efficiency, Drive Profitability*, John Henry , Business Development Officer, AssetMark (1.25 CTFA) in Joshua Tree	Tapping the 40 Trillion in IRAs and 401Ks*, Mat Sorensen , CEO, Directed IRA and Directed Trust Company (1.25 CTFA + CISP) in Presidio V	Workflow Wins: Streamline, Standardize, Succeed*, Cheetah team members , Cheetah (1.25 CTFA + 1.25 ATOP) in Turquoise I-II
3:00–3:30 pm	Break: sponsored by Cheetah		
3:30–5:00 pm	Executive Track	Investment Track	Operations Track
	Cybersecurity Panel The Evolving Cybersecurity Landscape*, John O'Connell , CEO & Founder, The Oasis Group and Panelists (1.75 CERP + 1.75 ATOP) in Joshua Tree	Stepping Up Your Estate Settlement Process*, Patrick Alyward , CEO, TrustWorthy Consultants (1.75 CTFA) in Presidio V	Cheetah Chats*, Clients and Cheetah Staff (1.75 ATOP) in Turquoise I-II
6:00–7:00 pm	Dinner at Sunset Point: food sponsored by Intersection and Moneytree, beverages sponsored by Zephyr		
7:00–9:00 pm	Dueling Pianos at Sunset Point: sponsored by Smartleaf		
THURSDAY, NOVEMBER 13			
7:30–8:30 am	Breakfast in Presidio I-IV: sponsored by Chicago Clearing		
8:30–9:30 am	2025 Tax Update*, Doug Hart and Doak Pfaff , Deloitte (1.25 CTFA, 1.25 ATOP + CISP) in Presidio V		
9:30–9:45 am	Break: sponsored by Cheetah		
9:45–10:45 am	Current Regulatory Priorities for the Trust Industry*, Patrick Alyward , CEO, TrustWorthy Consultants, LLC (1.25 CTFA, 1.25 ATOP + CRCM) in Presidio V		
10:45–11:00 am	Closing remarks in Presidio V		