

CAPITAL INVESTMENT COMPANIES

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# 2026 FALL CONFERENCE

ANNUAL SALES & COMPLIANCE CONFERENCE

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OCTOBER 18 - 20, 2026

MYRTLE BEACH, SOUTH CAROLINA

Myrtle Beach Marriott at Grand Dunes

INTEGRITY | INDEPENDENCE | INNOVATION

# CONFERENCE AGENDA

Monday, October 19th, 2026

| TIME             | PRESENTATION                                      | SPEAKER                 | LOCATION     |
|------------------|---------------------------------------------------|-------------------------|--------------|
| 7:30 am          | Breakfast                                         |                         | Atlantic 1-4 |
| 11:30 - 12:30 pm | Check In                                          |                         | Tides 1 & 2  |
| 12:00 - 12:30 pm | Lunch                                             |                         | Atlantic 1-4 |
| 12:30 - 12:45 pm | Welcome                                           | Richard Bryant          | Atlantic 1-4 |
| 12:45 - 1:00 pm  | "Seas" The Day                                    | Ben Brooks              | Atlantic 1-4 |
| 1:00 - 1:15 pm   | FSI Update and Introduction of Strategic Partners | Richard Yercheck        | Atlantic 1-4 |
|                  | Jackson                                           | Douglas Gresham         | Atlantic 1-4 |
|                  | Symetra                                           | Kit Cagle & Mike Liston | Atlantic 1-4 |
|                  | ExchangeRight                                     | Jason Roland            | Atlantic 1-4 |
|                  | SmartLeaf                                         | Bob Leaper              | Atlantic 1-4 |
|                  | Athene                                            | Trey Wegmann            | Atlantic 1-4 |
|                  | JP Morgan                                         | Nicole Dill             | Atlantic 1-4 |

# CONFERENCE AGENDA

Monday, October 19th, 2026 - Continued

| TIME           | PRESENTATION               | SPEAKER                                                  | LOCATION     |
|----------------|----------------------------|----------------------------------------------------------|--------------|
|                | Eagle Life                 | Chris Snyder                                             | Atlantic 1-4 |
|                | Corebridge                 | Kevin Hart                                               | Atlantic 1-4 |
| 2:00 - 2:10 pm | Break                      |                                                          | Atlantic 1-4 |
| 2:10 - 2:20 pm | Medicare                   | Parham McNair & John McNair                              | Atlantic 1-4 |
| 2:20 - 3:05 pm | Keynote Speaker            | Joe Hart                                                 | Atlantic 1-4 |
| 3:05 - 3:20 pm | Atcom                      | John Cameron                                             | Atlantic 1-4 |
| 3:20 - 3:55 pm | Capital Investment Counsel | Hal Eddins & Kurt Dressler                               | Atlantic 1-4 |
| 3:55 - 4:30 pm | CIAS                       | Ed Sabo, Miller Bryant, Emily Enriquez & Burke Freedland | Atlantic 1-4 |
| 4:30 - 5:15 pm | Compliance                 | Ron King & Lisa DeVine                                   | Atlantic 1-4 |
| 6:00 pm        | Cocktails                  |                                                          | Courtyard    |
| 6:45 pm        | Dinner                     |                                                          | Atlantic 5-8 |
|                |                            |                                                          |              |

# CONFERENCE AGENDA

Tuesday, October 20th, 2026

| TIME            | PRESENTATION        | SPEAKER                                              | LOCATION     |
|-----------------|---------------------|------------------------------------------------------|--------------|
| 7:30 - 8:00 am  | Bible Study         | Greg Hicks                                           | Atlantic 1-4 |
| 8:00 - 8:30 am  | Breakfast           |                                                      | Atlantic 1-4 |
| 8:30 - 8:35 am  | Welcome             | Ben Brooks                                           | Atlantic 1-4 |
| 8:35 - 9:00 am  | First Carolina Bank | Ron Day, Doug Ford,<br>Carter Cole & John<br>Slayton | Atlantic 1-4 |
| 9:00 - 9:15 am  | Tech Committee      | Bo Nicholson                                         | Atlantic 1-4 |
| 9:15 - 9:40 am  | Pershing            | Chris Fulco                                          | Atlantic 1-4 |
| 9:40 - 10:20 am | Redtail             | Joel Hurst                                           | Atlantic 1-4 |
|                 | Lincoln             | Turner Creech &<br>David Dickson                     | Atlantic 1-4 |
|                 | Barnabas            | Brian Enriquez, Cooper<br>Creech & Joe Powell        | Atlantic 1-4 |
|                 | First Trust         | Josh Gongaware                                       | Atlantic 1-4 |
|                 | Invesco             | Jamie Miller                                         | Atlantic 1-4 |
|                 | BlackRock           | Adam Shack                                           | Atlantic 1-4 |

# CONFERENCE AGENDA

Tuesday, October 20th, 2026 - Continued

| TIME             | PRESENTATION                 | SPEAKER                          | LOCATION     |
|------------------|------------------------------|----------------------------------|--------------|
|                  | Resource Financial           | Rick Joyner                      | Atlantic 1-4 |
|                  | Allianz                      | Brian Milberg & Michael Chadwick | Atlantic 1-4 |
|                  | Principal Funds              | Blake Hood                       | Atlantic 1-4 |
|                  | Brighthouse                  | Matt Albertelli                  | Atlantic 1-4 |
| 11:15 - 11:30 am | Insurance                    | RE Rose & Bill Nicholson         | Atlantic 1-4 |
| 11:30 - 11:40 am | Digital Marketing            | Evan Foster                      | Atlantic 1-4 |
| 11:40 - 12:15 pm | Compliance                   | Ron King & Lisa DeVine           | Atlantic 1-4 |
| 12:15 - 12:20 pm | Special Presentation         | Ben Brooks                       | Atlantic 1-4 |
| 12:20 - 12:30 pm | Conclusion & Raffle Drawings |                                  | Atlantic 1-4 |
| 12:30 pm         | Lunch                        |                                  | Atlantic 1-4 |
| 2:00 pm          | Insurance CE                 | RE Rose & Bill Nicholson         | Atlantic 1-4 |
|                  |                              |                                  |              |