

DAY 1 | TUESDAY, MAY 5 | NEXT25 BEGINS

12:00 pm	Registration Begins	Atrium
2:00 - 4:00 pm	Sponsor Setup in Exhibit Hall	Cottonwood
3:00 - 4:00 pm	Sowell University	Trinity River
	CE Class: <i>Breaking the 60/40 Habit: Asset Allocation for Modern Portfolio Construction</i> Seating priority to RSVP guests. Dr. Jason Hsu: Rayliant	
4:30 pm	Registration Ends	Atrium
4:30 - 5:00 pm	Welcome + State of the Company Daryl Seaton: President & CEO, Sowell Management	Amphitheater
5:00 pm	Keynote Introduction Bill Sowell: Founder & Chief Strategy Officer, Sowell Management	Amphitheater
5:00 - 6:00 pm	Keynote Speaker John Calipari: Hall of Fame Basketball Coach + 3X National Coach of the Year	Amphitheater
6:00 - 7:00 pm	Cinco de Mayo Cocktails + Exhibit Hall Networking	Cottonwood
7:00 - 9:00 pm	Welcome Dinner & Live Entertainment	The Pavilion

DAY 2 | WEDNESDAY, MAY 6 | NEXT25 ELEVATES

7:00 - 8:00 am	Breakfast & Exhibit Hall.....	Cottonwood
8:00 - 8:15 am	Opening Remarks..... Vince Gimarelli: Chief Development Officer, Sowell Management	Amphitheater
8:15 - 9:00 am	Wired to Advise: Innovation, AI, and the Future of the Client Relationship Patrick Hannon: Vice President of SaaS Commercialization at Fidelity Labs	Amphitheater
9:00 - 10:15 am	New! Advisor Partnership Program Launch	Amphitheater
	Bill Sowell: Founder & Chief Strategy Officer + Vincent Gimarelli: Chief Development Officer, Sowell Management Matt Brinker: Managing Partner + Rob Schimmel: Managing Director, Merchant Investment Management	
10:15 - 10:30 am	Exhibit Hall & Break.....	Cottonwood
10:30 - 11:00 am	Powering Advisor Growth: The Next Evolution of FLEX + GeoWealth	Amphitheater
	Jack Hannah, President and COO, GeoWealth	
11:00 - 11:45 am	Print, Baby, Print! Why AI Will Drive the Biggest Debt and Deficit in History Dr. Jason Hsu, Founder & CIO, Rayliant	Amphitheater
12:00 - 1:00 pm	Lunch & Keynote Speaker (Sponsor: First Trust)	The Pavilion
	The Never Quit Mindset with Navy Seal and Podcaster David Rutherford	
1:15 - 1:45 pm	The Missing Piece: Making Insurance a Strategic Advantage in Your Practice Daryl Seaton, Sowell Insurance Services and Sean Shea: Griffin Distribution Partners	Amphitheater

DAY 2 | NEXT25 ELEVATES | CONTINUED

1:45 - 2:30 pm	<i>Advisors Who Win: How to Harness AI</i> Amphitheater Jason Wenk, Founder & CEO, Altruist (fireside chat w/ Daryl Seaton)
2:30 - 3:00 pm	Break & Exhibit Hall Cottonwood
3:00 - 3:30 pm	<i>The Greatest Story Ever Sold</i> Amphitheater Michael Green, Portfolio Manager & Chief Strategist: Simplify
3:30 - 4:00 pm	<i>AI, Policy, and the Long Game: China's Rise vs. Japan's Revival</i> Amphitheater Host: Dr. Jason Hsu: Rayliant Panel: Fujia Liu and Zhidao (Tony) Yang: ChinaAMC, Shunsuke (Sean) Park: Sumitomo Mitsui DS Asset Management
4:00 - 4:50 pm	<i>Inside the Playbook: How Top Advisors Are Winning with Sowell CIO</i> Amphitheater Host: Scott Dooley, Managing Director of Investment Management, Sowell Management Panel: Phil Bodine: Wealth in Overdrive, Robert Clinton, Clinton Wealth Management, Tom Wood: Goldman Sachs Asset Management
4:50 - 4:55 pm	Day 2 Wrap Up & Dinner Information Amphitheater Scott Dooley, Managing Director of Investment Management: Sowell Management
5:30 - 6:30 pm	Cocktails and Live Entertainment Aire Libre (Poolside)
6:30 - 9:00 pm	Starlight Soirée Dinner + Networking Aire Libre (Poolside)

DAY 3 | THURSDAY, MAY 7 | NEXT25 FORWARD

7:00 - 8:00 am	Breakfast & Exhibit Hall Cottonwood
8:00 - 8:05 am	Opening Remarks Amphitheater Bill Sowell: Founder & Chief Strategy Officer, Sowell Management
8:05 - 9:00 am	<i>Navigating Cyber Risk in an Uncertain World</i> Amphitheater Rachel Wilson, Managing Director & Chief Data Officer, Morgan Stanley Wealth Management
9:00 - 9:30 am	<i>The Business of Athletes & Artists: How It Works—and Where It's Going</i> Amphitheater Joe Corbett, Managing Member Argentum Financial Collective
9:30 - 10:00am	<i>The \$5T Liquidity Wave: How Advisors Can Turn Business Owner Transition into AUM Growth</i> Amphitheater Panel: Matt Wilson, Sam Griffin, Stephanie Gilezan and Melanie Hoggard: Capital Connect
10:00 - 10:30 am	Exhibit Hall + <i>Bloody Mary Bar</i> (Sponsor: Capital Connect) Cottonwood
10:30 - 11:15am	<i>Shark Tank Panel: Pitch, Pressure & Portfolio Decisions</i> Amphitheater Hosts: Greg Lai + Alex Hsiao: Affinity Investment Advisors Panel: Sterling Colyer: AAM, Paisley Nardini: Simplify, and Hans Williams: Calamos
11:15 - 11:45am	<i>Regulation, Compliance, and AI, Oh My!</i> Amphitheater Patrick Hunt, CEO, SmartRIA
11:45 - 12:00pm	Closing Remarks Amphitheater Daryl Seaton, President & CEO, Sowell Management