
# ANNUAL REGIONAL SYMPOSIUM **AGENDA** 04/30/26

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| 7:30 | 8:00 | Registration and Networking Breakfast with our Partners | |
| 8:00 | 8:10 | Welcome and Announcements | |
| 8:10 | 9:00 | Annual Federal Tax Update<br>with Sam Donaldson | |
| 9:05 | 9:55 | The Silver Tsunami \| Protect Clients from the LTC Risk While Growing Your AUM<br>with Don Quante, CLTC | |
| 9:55 | 10:10 | Morning Stretch & Partner Break | |
| 10:10 | 11:00 | Guide to the Markets: Concentration and Opportunity<br>with Stephanie Aliaga | |
| 11:10 | 12:00 | Concurrent Break Out Sessions | |
| Select one | | Partner Breakout: Inland Securities \| Tax Advantaged Real Estate Solutions and BBB Tax Bill's Impact on Commercial Real Estate<br>with Joe Kingsley | Partner Breakout: Midland Advisory \| Advisory Annuity Solutions: The Next Verse in Retirement Income<br>with Len Durso, ChFC, AIF, RIA |
| 12:00 | 1:00 | Networking Lunch with our Partners | |
| 1:00 | 1:50 | Concurrent Break Out Sessions | |
| Select one | | Partner Breakout: LRM Group \|10 Planning Mistakes with Life Insurance – An Interactive Experience<br>with Bradley Uhl, CLU®, Sean Link, JD | Partner Breakout: Dimensional Fund Advisors \| Indexing Exposed: Passive Indices May Be More Active than You Think<br>with Sam Dinamarca |
| 1:50 | 2:10 | Afternoon Stretch & Partner Break | |
| 2:10 | 3:00 | Concurrent Break Out Sessions | |
| Select one | | Partner Breakout: Silver Bridges\| Navigating Senior Living- Understanding the Options<br>with Kristy Kennedy, Ginger Noce | Partner Breakout: Bonaventure Capital \| Grow AUM with DST & 721 Strategies<br>with Ian McElreath |
| 3:00 | 3:10 | Afternoon Stretch & Partner Break | |
| 3:10 | 4:00 | Unlocking Hidden Value: What Financial Professionals Need to Know About Reverse Mortgages<br>with Mark Fitzpatrick | |
| 4:00 | 4:50 | The Next Evolution of AI in Wealth<br>with Conner Powell | |
| 4:50 | 5:00 | Closing Remarks & Conference Adjourned | |
| 5:00 | 6:00 | Networking Happy Hour \| Relax & Unwind | |

*Looking forward to a fantastic day filled with knowledge sharing and connecting with others!*

**Samuel A. Donaldson, Professor of Law, Georgia State University |** Prior to joining GSU Law in 2012, Professor Donaldson was on the faculty at the University of Washington School of Law in Seattle for 13 years. During his tenure at the University of Washington, he was a five-time recipient of the Philip A. Trautman Professor of the Year award from the School of Law's Student Bar Association. Professor Donaldson served for two years as Associate Dean for Academic Administration and for six years as the Director of the law school's Graduate Program in Taxation.

Professor Donaldson teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law and professional responsibility. He is a nationally recognized speaker on federal taxation and estate planning at professional conferences and continuing education seminars.

Professor Donaldson is an Academic Fellow of the American College of Trust and Estate Counsel (ACTEC) and a member of the Bar in Washington, Oregon, and Arizona. Among his scholarly works, he is a co-author of the popular West casebook, Federal Income Tax: A Contemporary Approach, and a co-author of the Price on Contemporary Estate Planning treatise published by Wolters Kluwer.

Professor Donaldson has served as the Harry R. Horrow Visiting Professor of International Law at Northwestern University and a Visiting Assistant Professor at the University of Florida Levin College of Law.An amateur crossword constructor, Professor Donaldson's puzzles have been published in The New York Times, The Washington Post, The Wall Street Journal, and other outlets.

**Don Quante, CLTC, Author & Radio Host** | Don is the Author of two books "Don't Go Broke in a Nursing Home," an Amazon Best Seller and his new book "Tax-Free Benefits for Long Term Care in a Post Pandemic World." In addition, Don was the Host of the weekly Radio Show "Eldercare Financial Radio" Don is the Partner of Simplicity Asset Based LTC a National Marketing Organization specializing in asset based long-term care.

For over 40 years Don has worked in the financial planning industry. He is a nationally acclaimed speaker and trainer on the topic of long-term having trained over 1800 advisors. Don is a lifetime member of the Million Dollar Roundtables prestigious Top of the Table. His writing and speaking services have offered hope to thousands of families across the country that were faced with making decisions about long-term care planning and caregiving. Don lives near St. Louis Missouri with his wife, three children and four grandchildren.

**Stephanie Aliaga** is a Global Market Strategist on the J.P. Morgan Asset Management Market Insights Team based out of New York. In this role, Stephanie provides valuable insight and perspective on the global economy and markets to institutional and retail clients across the U.S. Stephanie's research has focused on the U.S. economy and structural investment themes, such as artificial intelligence. She is a key contributor to the *Guide to the Markets, On the Minds of Investors* blog, and serves on the committee that produces the Long-Term Capital Market Assumptions underpinning J.P. Morgan's strategic asset allocation process. Stephanie is also a frequent guest on Bloomberg, Yahoo! Finance, and other financial news outlets and is often quoted in the financial press. Prior to this role, Stephanie worked on the Global Investment Opportunities Group in J.P. Morgan's Private Bank, where she provided ultra-high net worth clients with opportunistic investment ideas and cross-asset trading execution.

She graduated from the Wharton School of Business at the University of Pennsylvania with a Bachelor of Science degree in Economics.

**Len Durso,** Regional Sales Director for Midland Advisory's Southern Region, brings over 25 years of experience in the financial services industry. Len's career started as an advisor and later transitioned to an asset manager role in his previous position. Upon joining Midland Advisory, Len brought a wealth of industry insights. Dedicated to establishing long-lasting partnerships with advisory practices, Len is committed to providing modern solutions that are tailored specifically for RIAs like yourself.

**Joe Kingsley, Senior VP, Inland Securities |** Joe works with financial advisors and their clients in the Southeastern United States. Joe has been in the real estate securities business for 25 years representing 1031 Exchange programs, Qualified Opportunity Zone Funds and real estate investment trusts. Joe went to the University of Arizona in Tucson and lives in Brookhaven with his wife, Yana, Son Joey and daughter Mariya.

**Bradley Uhl, CLU®** | The LRM Group focuses exclusively on providing objective insurance consulting support to fee-based and fee-only advisors and advisory firms. As an independent insurance advisor and advanced insurance planning consultant, Brad's emphasis is rooted in insurance plan design and consultation for a broad range of financial professionals, trust companies, tax and legal counsel.

Brad began his career with Hartford Life Insurance in 2012, received his bachelor's degree from The University of Georgia and is a Chartered Life Underwriter (CLU). Brad and his wife Kinsey and their son are residents of Woodstock, GA.

**Sean Link, JD, Estate Planning Specialist |** As the Estate Planning Specialist of The LRM Group, Sean Link focuses on providing estate planning consulting to fee based and fee-only advisors and advisory firms. With a background in fiduciary administration and estate planning for high-net-worth individuals, Sean approaches his work with a deep respect for not only the "what" and "how" of estate planning, but truly understanding the "why" behind a given legacy plan.

**Sam Dinamarca, Investment Strategist, Dimensional Fund Advisors.** Sam serves as a subject matter expert for Dimensional's equity portfolios. As an equity product specialist, he focuses on clearly communicating Dimensional's investment philosophy, strategy design, and implementation expertise. Sam brings a deep practitioner's perspective to his role, drawing on prior experience as a member of Dimensional's Portfolio Management team. In that capacity, he worked across three equity desks spanning the firm's product suite, developing hands-on expertise in portfolio construction, trading, and implementation across U.S. and international markets.

Sam earned a master's degree in economics from Duke University and a bachelor's degree in economics from the Humboldt University of Berlin, Germany. He is a CFA® Charterholder.

**Kristy Kennedy, Co-Founder, Silver Bridges Consulting** | Kristy brings a heart for service and over 20 years of expertise in the senior living industry. She spent a decade as a senior leader for one of the nation's top five senior living organizations. Kristy also served as Vice President at WellAware Systems, where she helped advance remote sensor technology to detect pre-emerging health conditions in senior living residents. Additionally, as VP of Operational Excellence at EmpowerMe Wellness, she played a pivotal role in delivering ancillary services to over 1,000 communities across 40 states, enhancing continuity of care for those in senior living.

**Ginger Noce, Co-Founder, Silver Bridges Consulting** | Ginger brings more than 25 years of corporate leadership experience, coupled with personal insight as a long-distance caregiver for her mother, with memory impairment. Her firsthand experience navigating the complexities of finding the right senior living community for a loved one gives her a unique perspective and deep empathy for families facing similar challenges.

Kristy and Ginger's professional expertise, combined with their personal journeys enables them to provide invaluable guidance and support to families making these important decisions. Their approach is hands-on, profoundly personal, and free from any bias. They prioritize forming lasting relationships with you and your loved ones and are your partner, through every step of the process.

**Ian McElreath, SVP Capital Markets, Bonaventure Capital |** Ian focuses on raising capital in the private wealth channel across Bonaventure's full suite of real estate investment strategies. He brings two decades of financial services experience to the role, having raised more than $900 million across alternative investment platforms. He has worked extensively with RIAs, independent broker-dealers and wirehouse advisors, advising them on investment strategies including REITs, BDCs, DSTs, 1031 exchanges and Opportunity Zone funds.

**Mark Fitzpatrick, Senior Mortgage Consultant, Longbridge Financial LLC**, a national leading mortgage company specializing in home equity for seniors.

Originally from Utah and California, Mark now proudly calls Idaho his home. He holds a Bachelor of Science in Biology from California State University, Fullerton, and brings nearly 20 years of mortgage industry experience, with the past decade focused on reverse mortgages. Mark is licensed in 22 states to conduct mortgages.

Outside of work, Mark enjoys spending time with his wife and three children. They love embarking on family adventures, including camping, fishing, hiking, and skiing. Recently, his kids introduced him to the exciting world of rock hounding!

**Conner Powell, Account Executive, Jump |** Conner is an Account Executive at Jump AI. He has worked in the financial services industry for three years now and enjoys helping advisors implement AI to be more efficient and allow them to excel in their roles. Conner is originally from Utah and enjoys golfing, boating, and spending time with his wife and baby