

ADVISOR SUMMIT 2026 AGENDA

OCTOBER 25–28, 2026
AC Hotel · Downtown Greenville, SC

ADVISOR AGENDA

SERATONIC

SUNDAY OCTOBER 25

- 1:00 PM ARRIVE IN GREENVILLE
- 6:00 PM SUNDAY NIGHT BBQ
Lewis Barbecue

MONDAY OCTOBER 26

- 8:00 AM BREAKFAST
Lobby
- 9:00 AM DISCOVERY MEETINGS PANEL
Best Practices · Seratonic
- 10:00 AM BREAKOUT
- 10:30 AM DISCOVERY SHIFT
Chris Holman · Seratonic
- 11:30 AM BREAKOUT
- 12:00 PM LUNCH
Seratonic
- 1:00 PM WORKSHOPS PANEL
Best Practices · Seratonic
- 2:00 PM BREAKOUT
- 2:30 PM THE CAPACITY ADVANTAGE
Carmine Corino & Anthony DePersio · Seratonic
- 3:30 PM BREAKOUT
- 4:00 PM RISE AGAINST HUNGER
- 6:00 PM CELEBRATION DINNER
CAMP

TUESDAY OCTOBER 27

- 8:00 AM BREAKFAST
Lobby
- 9:00 AM COI BEST PRACTICES PANEL
Best Practices · Seratonic
- 10:00 AM BREAK
- 10:30 AM REFERRAL WORKSHOP PT. 2
Brian Gallary · Seratonic
- 11:30 AM BREAKOUT
- 12:00 PM LUNCH
Seratonic
- 1:00 PM REVIEWS PANEL
Best Practices · Seratonic
- 2:00 PM BREAKOUT
- 2:30 PM AI AGENTS
Brian Boughner · Seratonic
- 3:30 PM BREAKOUT
- 4:00 PM HAPPY HOUR
- 6:00 PM SMALL GROUPS DINNER
Various restaurants, downtown Greenville

WEDNESDAY OCTOBER 28

- 8:00 AM DEPART GREENVILLE

OPERATIONS AGENDA

AC HOTEL · BROAD AND MAIN · 2ND FLOOR

The operations schedule is being finalized. Check back soon.