



ROUTE 2026

OCTOBER 12, 2026

ARC ADVISOR CIRCLE

NETWORKING & EDUCATION CONFERENCE

OCTOBER 12 & 13, 2026 | HOTEL INDIGO LAS COLINAS

10:00 AM-12:00 PM **ARCADEMY: BUSINESS PLANNING SESSION**

led by Anders Smith CFP®, CIMA®, CPWA®, RMA®, RICP®, National Sales Consulting and Dr. Rick Jensen, Delaware Life

12:00-1:00 PM **LUNCH**

1:00-1:30 PM **ROUTE 2026 WELCOME**

Sarah Pais, ARC Chief Executive Officer

1:30-3:20 PM **KEYNOTE: DRIVE TO THE TOP OF FINANCIAL SERVICES**

Dr. Rick Jensen, Delaware Life

3:20-3:30 PM **BREAK**

3:30-4:20 PM **PERSONAL ALPHA**

Dan Coates, Senior Vice President, Session sponsored by InspereX

4:20-5:00 PM **THE MARKETING YOU'RE ALREADY DOING (AND THE GAPS YOU CAN'T SEE FROM INSIDE IT)**

Tamra Gaines, ARC Director of Marketing + Live Demo w. Jean Paul Lagarde, AIQ/ARC Chief Investment Officer

6:00-9:00 PM **WELCOME PARTY AT THE SHOP CLUB**

Hotel Shuttle: Meet in the hotel lobby. Shuttles begin departing at **5:45 PM** and will run every **15 minutes**. The final shuttle to **Hotel Indigo** will depart at **9:00 PM**.

EXCEPTIONAL RESOURCES. COLLABORATED WISDOM. INSPIRED BY INTEGRITY.

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8:00-9:00 AM

BREAKFAST

Hotel restaurant terrace

9:00-9:10 AM

DAY 2 WELCOME

Brandon Day, ARC President

9:10-10:00 AM

EXPANDING YOUR TEAM

Kaana Smith, Senior Associate Advisor Advancement Institute NYLIM

10:00-10:30 AM

ROUNDTABLE: SESSION #1

10:30-10:45 AM

BREAK

10:45-11:40 AM

BUILDING MOMENTUM AMIDST UNCERTAINTY

Kevin Bishopp, Vice President, Session sponsored by First Trust

11:45 AM-12:15 PM

ROUNDTABLE: SESSION #2

12:15-1:15 PM

LUNCH

1:15-1:45 PM

UNDER THE HOOD: HOW ADVISORS ARE SCALING WITH AI

Panelist: Mathew Welsh, CFP®, and Stephen Ferrell, AIF®, Moderated by John Andrews, Virtus

1:45-2:00 PM

BREAK

2:00-2:50 PM

FIRESIDE CHAT

with Kevin Gordon, Charles Schwab Head of Macro Research and Strategy and Ken Harris, Charles Schwab Director of RIA Distribution

3:00-3:40 PM

CLOSING THE LOOP: PROSPECTING & YOUR MARKETING PLAN

Tamra Gaines, ARC Director of Marketing and Honileth Virani, ARC Advisor Partnerships Manager

3:40-4:00 PM

ROUTE 2026 CLOSING

Sarah Pais, ARC CEO