

AGENDA

CFP BOARD

**CONNECTIONS
CONFERENCE 26**

MONDAY, OCTOBER 5

7-7:50 a.m.	Breakfast & Exhibit Hall
7:50-8 a.m.	Opening Remarks by CFP Board Leadership
8-9 a.m.	KEYNOTE: The Magic of Behavioral Finance
9-10 a.m.	KEYNOTE: Future-Proof Yourself: Innovate and Thrive In Times of Uncertainty
10:30-11:30 a.m.	CONCURRENT SESSIONS -ACADEMIC PRESENTATIONS: Financial Planning Value, Advice, Technology and Investment Decision-Making -ACADEMIC PRESENTATIONS: Behavioral Investing, Crypto and Market Dynamics -Planner Pathways: Exploring Entry Points Into Financial Planning Roles -New Insights From the Financial Planning Longitudinal Study -What a CFP® Professional Should Know About Data Security -The Facts and Fictions of Succession Planning -Fueling a Program: Gifts, Grants and Creating Dollars
11:45 a.m. – 12:45 p.m.	SPOTLIGHT SESSIONS -She's Not a Niche: Reimagining Financial Planning for Women at Every Stage -From Exploration to Execution: Operationalizing AI
12:45-2 p.m.	Lunch & Exhibit Hall
2-3 p.m.	CONCURRENT SESSIONS -ACADEMIC PRESENTATIONS: Advisor Behavior and Client Engagement -ACADEMIC PRESENTATIONS: Financial Planning Education and Career Pathways -Finding Your Fit: Positioning Yourself for a Successful Career in Financial Planning -Two Seats at the Table: Building Better Relationships With Client Couples -Public Policy Washington Update 2026: The Midterms, the Profession and CFP Board's Advocacy in a Shifting Landscape -Demystifying CFP Board Enforcement: How the <i>Code & Standards</i> Are Applied in Real Cases — and How to Avoid Common Missteps -From Intention to Parenthood: Financial Planning for Surrogacy -Thinking Outside the Box: Creating Impactful and AI-Proof Projects and Cases for Your Students
3-4 p.m.	Exhibit Hall & Networking
3-4 p.m.	Academic Poster Session
4-5 p.m.	KEYNOTE: From Financial Planning to Vitality Planning: A New Standard of Care
6-8 p.m.	Welcome Reception: Topgolf

TUESDAY, OCTOBER 6

6:30-7:30 a.m.	Yoga Class
7-7:45 a.m.	Breakfast & Exhibit Hall
7:45-8 a.m.	Opening Remarks
8-8:50 a.m.	KEYNOTE: Scaling Advice: From Financial Advisor to Financial Advice
8:50-9 a.m.	Mindfulness for Busy Professionals
9-10 a.m.	KEYNOTE: The Future We're Building: Leaders from CFP Board, FPA®, FFP, NAPFA and Quad-A on What's Next for Financial Planning

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TUESDAY, OCTOBER 6 (CONTINUED)

10:30-11:30 a.m.	CONCURRENT SESSIONS -ACADEMIC PRESENTATIONS: AI, Advisors and Professional Practice -ACADEMIC PRESENTATIONS: Household Constraints and Financial Resilience -The Power of Connection: From Small Talk to Real Impact -The Future of Advice: Why Financial Fulfillment Will Define the Next Era of Planning -Social Security Planning in Uncertain Times -Using Social Media to Educate and Build Trust While Avoiding Ethical Compliance Risks -Peer Financial Coaching Programs for Registered Programs: From Launch to Scale -Building the Talent Engine: How Leading Firms Attract, Develop and Retain the Next Generation
11:45 a.m. – 12:45 p.m.	SPOTLIGHT SESSIONS -Teaming for Special Needs Financial Planning: A Multi-Disciplinary Perspective -ALTS! Understanding the Promise and Pitfalls of Alternative Investments
12:45-2 p.m.	Lunch & Exhibit Hall
2-3 p.m.	CONCURRENT SESSIONS -ACADEMIC PRESENTATIONS: Consumer Protection, Disclosure and Fiduciary Questions -ACADEMIC PRESENTATIONS: Financial Well-Being, Family and Socialization -Building While Growing: Strategies for Strengthening Registered Programs -From Silos to Strategy: Integrating Tax, Investments and Estate Planning for Better Client Outcomes -Navigating Divorce and Other Marital Conflicts -New Research Using the FPLS Data: Best Paper Award Finalists -Closing the Advice Gap: Developing Practice Standards for Serving Underserved Households -Pro Bono Training -From Search to Answer: What AEO Means for the Future of Advisor Marketing
2-3 p.m.	Student Speed Networking
3-4 p.m.	Exhibit Hall & Networking
4-5 p.m.	KEYNOTE: The Intelligent Practice: AI's Strategic Frontier in Financial Planning
5:30-7 p.m.	Student Tailgate Reception
5:30-7 p.m.	AFS Award Dinner
7-9:30 p.m.	Hall of Fame Dinner

WEDNESDAY, OCTOBER 7

7-8 a.m.	Breakfast & Exhibit Hall
8-9 a.m.	CONCURRENT SESSIONS -ACADEMIC PRESENTATIONS: Retirement, Insurance and Risk Tolerance -ACADEMIC PRESENTATIONS: Inclusion, Equity and Trust in Financial Planning -Who Loves Lucy? Implementation & Outcomes With AI in a Capstone Class -Leaving a Legacy: Making Estate Planning Part of the Ongoing Client Conversation -The Journey to Becoming a Trusted Advisor -Optimized Tax Planning in the Digital Era: Using Data Analytics and Machine Learning to Enhance Recommendations -Pro Bono in Practice: How Morgan Stanley Activated More Than 300 CFP® Professionals to Advise People in Need -Managing Sudden Wealth: From NIL to Retirement -Organic Growth That Works: Client Experiences, COI Partnerships and Digital Marketing
9:30-10:30 a.m.	KEYNOTE: A Conversation on Markets, Leadership and the Future of Financial Planning
10:30-11 a.m.	Closing Remarks by CFP Board Leadership
11 a.m. – 1 p.m.	CFP Board Ethics: A Practical Application of CFP Board's Code and Standards

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