2026 Deals & Dealmakers Summit Agenda

Tuesday, September 1st

Pre-Conference Off-Site Events (Invite Only)

Time	Event
11:30 AM	Check-in for Golf, Box Lunch, Warmup
12:30 PM	Tee Off (Shotgun Start)
5:30 PM - 6:30 PM	Post-Golf Cocktails and Awards
6:00 PM - 7:30 PM	Chart House Cocktail Reception
7:30 PM	Sunset Dinner at Chart House

Wednesday, September 2nd

Summit Day One

Time	Event
8:00 AM - 11:00 AM	Registration Open (Salon 5 & 6)
9:00 AM - 11:00 AM	Optional Pre-Conference Workshop: Valuation Executive Masterclass (Located in Salon 5 & 6)
11:00 AM - 5:30 PM	Registration Open (Pacific Promenade Lawn)
11:45 AM - 1:00 PM	Networking Lunch with Experts and Sponsors

1:00 PM - 3:00 PM	"Ask the Experts" (5x20 Minute Intro Meetings)
3:00 PM - 3:30 PM	Networking Break
3:30 PM - 3:40 PM	Welcome and Vision for the Summit
3:40 PM - 4:30 PM	The State of Wealth Management M&A: The Trends Every Dealmaker Needs to Know
4:30 PM - 5:20 PM	The Growth Paradox: Why Success Creates Complexity and How Leaders Win
5:20 PM – 6:30 PM	Cocktail Reception Overlooking Salt Creek Beach
6:30 PM - 8:30 PM	"Dealmakers Dinner" at Sunset

Thursday, September 3rd

Summit Day Two

Time	Event
8:00 AM - 5:00 PM	Registration Open
7:00 AM - 8:00 AM	Networking Breakfast
8:00 AM - 8:10 AM	Welcome and Introduction
8:10 AM - 9:00 AM	Beyond the LOI: What Successful Sellers Learned Along the Way
9:00 AM - 10:30 AM	The 15th Annual Great Dealmaker Debate
10:30 AM - 11:00 AM	Mid-Morning Break
11:00 AM - 12:00 PM	Inside the Deal Process: The Art and Science of Transaction Execution
12:00 PM - 1:10 PM	Lunch and Networking

1:10 PM - 2:00 PM	The New Capital Playbook: Minority Equity, Private Debt, and Strategic Alternatives
2:00 PM - 2:50 PM	Beyond the Purchase Price: Legal, Tax and Structural Issues That Shape Outcomes
2:50 PM - 3:20 PM	Networking Break
3:20 PM - 4:10 PM	The Golden Era of Entrepreneurship: How Exceptional Owners Think, Decide, and Win
4:10 PM - 5:00 PM	The Great Reshuffle: Why Advisors Are Rethinking Affiliation, Ownership, and Independence
5:00 PM	Recap, Review, and Reward!
5:00 PM - 8:00 PM	"Closing the Deal" Cocktail Reception and Dinner at Sunset