



ADVISORCON 2025 AGENDA

Little Things > Big Results | San Juan, Puerto Rico

01.23.25 | 01.24.25

8:30 AM | Check In & Mingle

Part of the magic of AdvisorCon is the chance to meet up with old friends or make new ones. We recommend arriving at the conference as early as possible to introduce yourself to the other advisors around you. This will get you started on swapping ideas, sharing observations, and making connections that will last your entire career.

**9:00 AM | Welcome & Technology Update**

Incorporating Modern Technology into Your Business
Frantz Widmaier

**10:00 AM | Playing the Long Game**

The Little Details That Land the Biggest Clients
Neil McPeak, Jr.

**11:00 AM | Always Be Prospecting**

How to Ensure No Prospect Slips Through the Cracks
Kathy Hobart

12:00 PM | 1-Hour Break for Lunch

Savor a variety of Puerto Rico's tastiest dishes, from classic favorites to exciting new flavors, while you chat with fellow attendees. Enjoy making new friends and creating great memories as you mingle and share stories!

**1:00 PM | Leaner, Larger, Better**

Building the Perfect Practice for a HNW Niche
Anasuya Kabad

**2:00 PM | Tweaks & Tune-Ups**

Simple Adjustments That Yield Big Results
David Scott & Nick Kibble

**3:00 PM | How to Clone Yourself**

The Three Major Pillars of a Productive Team
Victor Salinas

5:00 PM | Cocktail Party

Join us for a spread of delicious food and refreshing drinks, where you can socialize, network, and make lasting connections with your fellow attendees!



9:00 AM | Growing As You Change

How to Keep New Assets Flowing While Navigating Key Business Transitions
Michael Hudock



10:00 AM | Client Engagement 2.0

How to Personalize Every Interaction to MAXIMIZE Every Interaction
Brian Uhlinger & Kimberly Gildea



11:00 AM | Referrals Without Asking

Small Gestures That Turn Clients into Raving (and Referring) Fans
Rob Messett

11:50 AM | 40-Minute Break for Lunch

Enjoy one last chance to swap ideas, compare notes, and make future plans with both the speakers and your fellow attendees.



12:30 PM | Panel Discussion

Superstar Successors

Michael Hudock, Anasuya Kabad, Neil McPeak Jr., Frantz Widmaier



1:30 PM | New Roads, Better Sewers

The Latest Improvements to the 110% Gorilla Chart
Bill Good

2:30 PM | Adjourn

Make those last-minute connections, then head out to explore all the incredible sights and experiences Puerto Rico has to offer!

Get Your Ticket Today

Join Us in San Juan, Puerto Rico!

Join us at AdvisorCon 2025 in San Juan, Puerto Rico, for an unforgettable two days that will transform the way you think about growth, strategy, and success. It's time to discover how small changes can lead to monumental results in your practice. Get your tickets today and look forward to an unforgettable conference in paradise.

GET TICKETS