



CFD COMPANIES



United [★]250

FALL FINANCIAL ADVISER CONFERENCE

20
26

Conference Agenda
September 16-18



CONFERENCE **REGISTRATION**

Scan the QR Code or click the link below to get registered
for the Fall Financial Adviser Conference!

<https://adviser.cfdinvestments.com/2026-fall-conference-registration/>



CFD COMPANIES

CFD INVESTMENTS



CREATIVE FINANCIAL DESIGNS



CFD INSURANCE PLANNERS



CFD INSURANCE



CFD BANKING SERVICES



CFD TAX PREPARATION



ALTER & ROCKEY

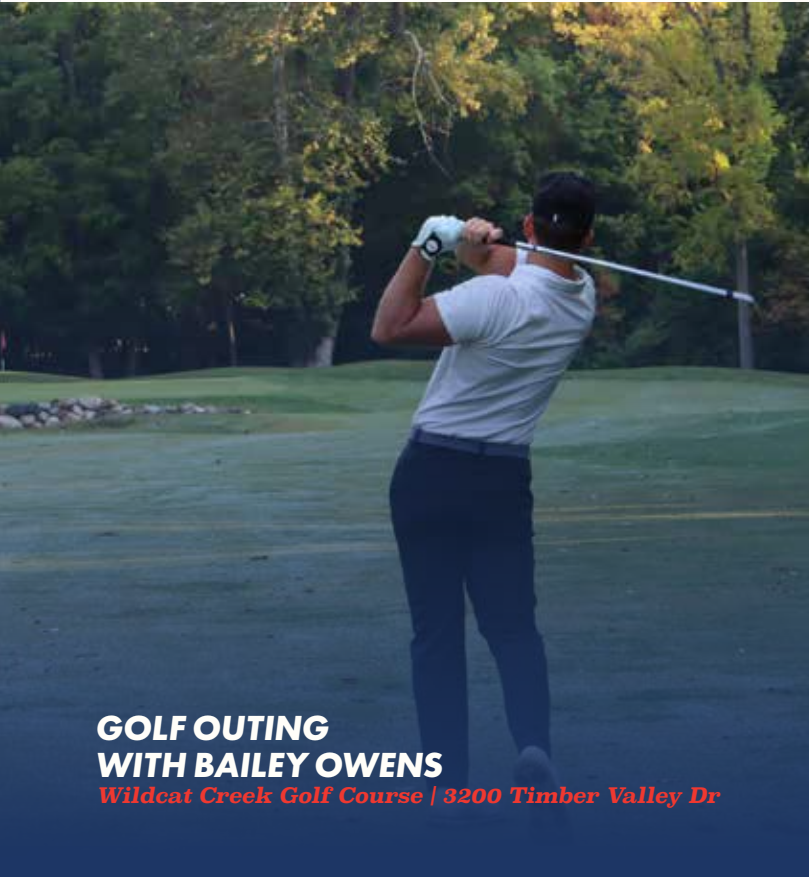


CFD REALTY



PRE-CONFERENCE ACTIVITIES

Wednesday, September 16th, 8:00am - 12:00pm



GOLF OUTING WITH BAILEY OWENS

Wildcat Creek Golf Course | 3200 Timber Valley Dr



CORNHOLE TOURNAMENT WITH MARK ATKINS

Creative Financial Centre®



PICKLEBALL OUTING WITH BRENT OWENS & KREGG ROOZE

Bon Air Pickleball Courts | 700 East Fischer St



INDOOR BOARD AND CARD GAMES WITH MARIA BARNES

Creative Financial Centre®

WEDNESDAY

September 16, 2026 – Start of Conference

12:00PM - 1:00PM

Café

LUNCH WITH WHOLESALERS

Boxed Lunches

1:00PM - 1:45PM

Auditorium

MATTHEW BAHRENBURG

FMG Testimonials



1:45PM - 2:30PM

Auditorium

GREG SMITH

2026 and 2027 Tax Updates



2:30PM - 3:15PM

Auditorium

ROBERT MIZE, ON TARGET CPA, JHR PENSIONS

Group Planning Alternative Solutions: Three CFD Client Case Studies



3:15PM - 4:00PM

Auditorium

KREGG ROOZE

Your Investment Management Advantage



4:00PM - 4:30PM

Auditorium

CHRIS PAULITZ, FSI



4:30PM - 5:00PM

Auditorium

TERRY COVERT & ZACHARY COVERT

Family Business Legacy

Terry Covert has held many titles in his professional life, including Army veteran, futures/commodities broker, business news television reporter, and entrepreneur, with one company growing to eleven offices in seven states. He is best known by many in the CFD family for his work as VP, CCO, and General Counsel at Timothy Plan, having joined as one of the earliest employees at the behest of his long-time friend, Art Ally. Despite his long tenure at Timothy, where he remains as retained counsel, he entered law as a second career, partnering with an established estate planning practitioner in 2007. Today, that law firm, known as Copeland, Covert & Smith, serves over 5,000 clients in estate and business planning issues. His wealth of experience has led to many seeking him out for counsel on every facet of family legacy planning.



6:00PM - 8:00PM

Various Locations

CORPORATE SPONSOR DINE AROUND KOKOMO

Join your fellow advisers and our corporate sponsors for an evening of networking and good conversation at some of Kokomo's top rated dining experiences like Marble the Steakhouse, Hacienda, Pastarrific, and more. Please be sure to select your dinner option during registration as space is limited. We look forward to dining with you!

THURSDAY

September 17, 2026 – Mandatory Day

8:00AM - 8:30AM

Café

BREAKFAST & REGISTRATION

8:30AM - 9:45AM

Auditorium

TEAM CFD MEETING

9:45AM - 11:00AM

Auditorium

BRENT OWENS

Look Ahead to 2027



11:00AM - 12:00PM

Auditorium

KEYNOTE SPEAKER: STEPHEN COVEY

Stephen M. R. Covey is co-founder and CEO of CoveyLink Worldwide. A sought-after and compelling keynote speaker and advisor on trust, leadership, ethics, and high performance, he speaks to audiences around the world. He is the author of *The SPEED of Trust*, a groundbreaking and paradigm-shifting book that challenges our age-old assumption that trust is merely a soft, social virtue and instead demonstrates that trust is a hard-edged, economic driver—a learnable and measurable skill that makes organizations more profitable, people more promotable, and relationships more energizing. He advocates that nothing is as fast as the speed of trust and that the ability to establish, grow, extend, and restore trust with all stakeholders is the critical leadership competency of the new global economy.



12:00PM - 1:30PM

Café

LUNCH WITH WHOLESALERS

Lunch provided by Mitchell's Mexican Grill

1:00PM - 1:30PM

Cornerstone Room

ADVISER TRANSITION PROGRAM MEETING

Kickoff event for current Junior and Supporting Advisers

1:30PM - 3:15PM

Auditorium

PLATINUM & GOLD SPONSOR PRESENTATIONS

3:15PM - 5:15PM

Auditorium

ANNUAL COMPLIANCE MEETING

6:00PM - 8:00PM

Auditorium

DINNER AT THE EXPERIENCE

1801 Country Club Drive, Kokomo, IN 46902
Dinner provided by Angry Donkey

FRIDAY

September 18, 2026 – End of Conference

7:15AM - 8:45AM

Café

PRAYER BREAKFAST

Sponsored by Timothy Plan, Eventide, and Inspire

8:45AM - 9:30AM

Auditorium

EMERGING ADVISER QUALIFIER: STEVEN CARPENTER

Success to Significance: The Advisor's Greatest Legacy—How advisers can build enduring firms through stewardship, leadership development, and intentional succession planning



9:30AM - 10:15AM

Auditorium

PRESIDENTIAL ADVISER QUALIFIER: AL CHANDLER

The IDEAL Financial Advisor



10:15AM - 11:00AM

Auditorium

PRESIDENTIAL ADVISER QUALIFIER: BEN FRANKLIN

Reflections from a Half Century in the Financial Services Industry



11:00AM - 12:00PM

Auditorium

EMERGING ADVISER QUALIFIER: ERIC GRZEGORSKI

Estate Planning



12:00PM - 1:30PM

Café

LUNCH WITH WHOLESALERS

Boxed Lunches

THIS CONCLUDES THE 2026 FALL FINANCIAL ADVISER CONFERENCE
Please feel free to depart at your leisure. Thank you for your attendance!

2:00PM - 3:00PM

Auditorium

SUPER CE SESSION

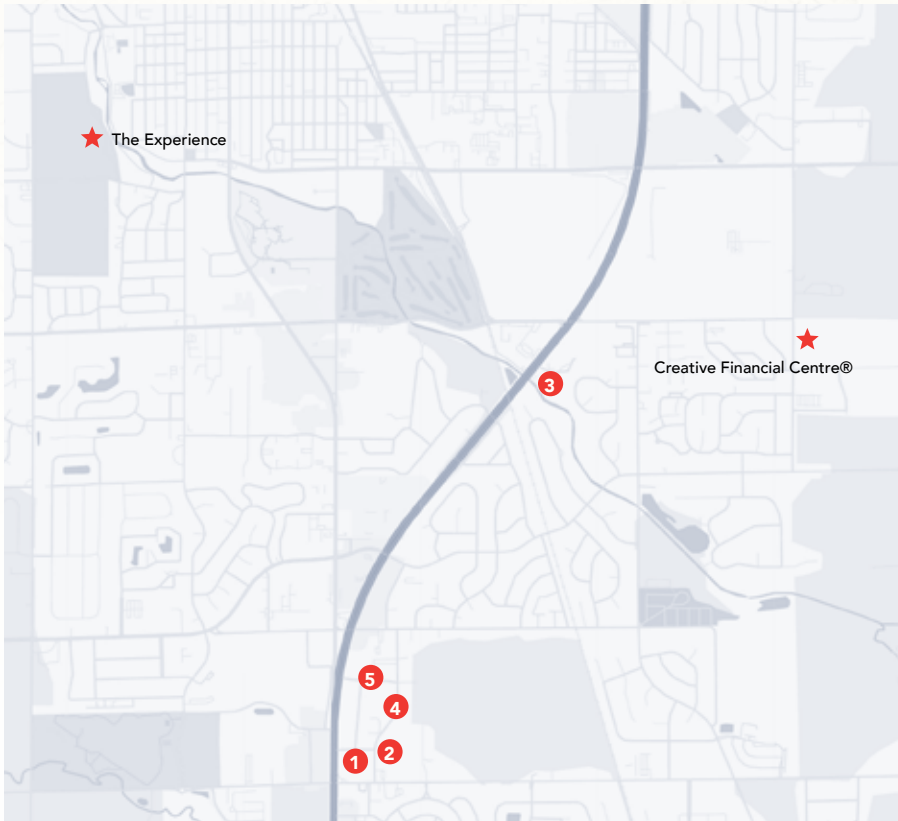
Your opportunity to earn CE credits!

SUPER CE EVENT

Earn Life & Health, CFP, IAR, IWI, and CFFP CE credits at no cost by registering through the United 250 Fall Conference link.

Complete your CE test at the home office to have credits automatically added to your transcripts for license renewal. Don't miss your chance to earn this valuable information during this exclusive opportunity!

HOTEL INFORMATION & MAPS



CREATIVE FINANCIAL CENTRE®



CFD PREFERRED RATE OPTIONS

1) Courtyard by Marriott:
765.453.0800

2) Fairfield Inn & Suites:
765.926.3100

3) Hampton Inn & Suites:
765.455.2900

4) Home2 Suites:
765.319.1300

5) La Quinta Inn & Suites:
765.453.2222

NONPREFERRED RATE OPTIONS

Baymont by Wyndham:
765.416.6570

Best Western: 765.453.8822

Comfort Inn: 765.252.4818

Days Inn & Suites by Wyndham:
765.450.9766

Motel 6: 765.450.6630

Super 8 by Wyndham:
765.252.1938

FALL CONFERENCE DINNER

The Experience:
765.480.8292



CFD COMPANIES



LOOKING FORWARD TO SEEING YOU!

We look forward to seeing you in September. Make sure to register and get ready for a transformative experience! Stay connected with us for more updates and follow us at CFD Companies across all social platforms.



Located in the Creative Financial Centre®
2704 South Goyer Road · Kokomo, IN 46902

Toll Free: 800.745.7776 | Phone: 765.453.9600 | Fax: 765.864.4080

Advisory services are provided through Creative Financial Designs, Inc. Registered Investment Adviser, and securities are offered through cfd Investments, Inc., a registered Broker/Dealer. Member FINRA and SIPC
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