Partner Roundtable Sessions - 1-2pm

ORGANIZED IN THE SPIRIT OF SMALL GROUP LEARNING AND INFORMAL CONVERSATION, EACH ROUNDTABLE IS HOSTED BY AN FPA OF MIAMI PARTNER WHO WILL INITIATE A LIVELY EXCHANGE ABOUT A TOPIC OR INDUSTRY TREND.

ROUNDTABLES WILL COMPRISE OF 3*20 MINUTE SESSIONS:

ROUNDTABLES

CORAL GABLES TRUST

ROUNDTABLE #1
Topic "The Benefits of a Trust for Your Clients"
Michael Unger & Eileen Santana

ARTISAN PARTNERS

ROUNDTABLE #2
Topic "Rethinking Credit Allocations – Building More Resilient Portfolios in Public Credit Markets"
Alex Gutierrez

American Heart Association. Professional Advisor Network

ROUNDTABLE #3
Topic "Create More Meaningful Client Conversations" - 2027 Continuing Education Webinars and Charitable Gift Annuities
Aaron Westlake

CAPITAL GROUP® | AMERICAN FUNDS®

ROUNDTABLE #4
Topic "Fixed Income Insights – Bonds offer balance during economic uncertainty"
Marek Blaskovic

GRAYSCALE®

ROUNDTABLE #5
Topic "Bringing clients crypto in-house: Turning held-away digital assets into new AUM"
Tracey Wright

HARDING LOEVNER

ROUNDTABLE #6
Topic "2026: The Year We Ran Out of Bingo Squares"
Apurva Schwartz/Katie George

Hines
GLOBAL INCOME TRUST

ROUNDTABLE #7
Topic "Why Commercial Real Estate makes sense today for client Portfolios"
Reagan Fredrickson

INTREPID CAPITAL

ROUNDTABLE #8
Topic "Where Wall Street Doesn't Look: Finding Value in Small-Issue Credit"
Nick Elias & Greer Smith

SATURNA CAPITAL | AMANA FUNDS

ROUNDTABLE #9
Topic "The $1 Trillion Fixed-Income Market Nobody Knows About"
Brandon Balazi

SEAFARER®

ROUNDTABLE #10
Topic "Beyond the Concentration of AI in the Emerging Markets"
Daniel Duncan

ROUNDTABLES

Touchstone Investments®
DISTINCTIVELY ACTIVE®

ROUNDTABLE #11
Topic "Key Performance Indicators every advisor should know to grow their practice"
Jeffrey Bryan

T.RowePrice

ROUNDTABLE #12
Topic "Income Reimagined with T Rowe Price"
Anna Kinsella & Martin Tischler

Zacks
INVESTMENT MANAGEMENT

ROUNDTABLE #13
Topic "Harnessing the power of earnings estimate revisions"
Tadas Misiunas

Many thanks to all of our Platinum & Gold Partners:

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