INNOVATE SUMMIT

FEBRUARY 25-26, 2027

JOIN US FOR THE INDUSTRY'S MOST POWERFUL PRACTICE-TRANSFORMATION TRAINING

Ready to start 2027 strong? Innovate Summit will explore today's top opportunities for growth-minded advisors. We'll dive deep into the short-term and long-term tax outlooks for U.S. savers, how to structure Roth conversions in today's tax and IRMAA environment, top marketing strategies to attract new leads and increase wallet share, and the latest product and strategy developments. You'll leave with new ideas you can implement now to grow your practice and ***make 2027 your best year ever***.

THURSDAY | 10:00 AM - 5:00 PM

2027 Legislative Outlook: OBBBA – and What it Means for U.S. Savers

The "Right" Way for Roth Conversions: Minimizing Taxes and IRMAA for Your Clients

Emerging Income Risks: What's Ahead for the Markets and More

Long-Term Tax Outlook: Where Taxes are Headed and How to Help Your Clients Prepare

FRIDAY | 7:30 AM - NOON

Ask the Actuary: The Latest Developments in Product, Underwriting, and More

Lead Generation 2027: Top Messages to Drive Appointments

Annuities Driving Alpha: A New Way to Analyze FIAs

The "New Holistic": Combining AUM, Annuities, and IUL to Create Powerful Income Plans

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