



FEBRUARY 26-27, 2026

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

**Ready to start 2026 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 2026 your best year ever.***

### THURSDAY | 10:00 AM - 5:00 PM

**2026 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 2026:** 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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