

MSF Advisor Growth Summit

Community · Collaboration · Cultivate

8:30 AM – 12:30 PM Both Days | Growth-Oriented Financial Advisors

DAY 1 — COLLABORATE

Align on vision, identify constraints, and define strategic growth priorities

8:30 – 8:45

Opening & Strategic Framing

Summit objectives, MSF 2026 key initiatives, and The 3 C's as a growth framework

8:45 – 9:30

MSF Strategic Plan & Advisor Alignment

Overview of MSF growth strategy, commitment to advisor relationship expansion, and building synergy

9:30 – 10:30

Advisor Practice Deep Dive

Business model & niche, planning philosophy, 1–3 year growth vision, and KPI tracking

10:40 – 11:40

Identifying Pinch Points

Exploring capacity constraints, staffing challenges, revenue bottlenecks, and technology inefficiencies

11:40 – 12:00

Strategic Partnership Discussion

Where MSF can create leverage, high-impact support opportunities, and defining indispensable partnership value

12:00 – 12:15

★ Investment Strategy & Growth Council

Featured remarks from the Investment Strategy and Growth Council — market outlook, strategic priorities, and advisor growth opportunities

12:15 – 12:30

Close & Preview of Cultivation Day

Rapid fire recap and preview of Day 2: Business Development, Succession Planning, Revenue Expansion & Action Plan

Evening — Group Bowling & Dinner at Prime 47

DAY 2 — CULTIVATE

Equip advisors with implementation tools to increase revenue, efficiency, and enterprise value

8:30 – 8:45

Recap & Priority Confirmation

Recap of Day 1 themes: Advisor Alignment, Practice Deep Dive, Pinch Points, and Strategic Partnership

8:45 – 9:45

Business Growth Tools

NNA Program (recruiting & scalable growth), Business Builder Tool, and Prepared Buyer/Seller Programs

9:45 – 10:30

Succession & Continuity Strategy

Succession vs. continuity planning, enterprise value drivers, risk mitigation, and practice valuation readiness

10:40 – 11:30

Revenue Expansion & Capacity Building

Leveraging BGA support, monetizing advanced planning, and strategic reinvestment into staffing, AI & automation

11:30 – 12:00

Vendor & Resource Optimization

Strategic vendor alignment, technology integration, and operational efficiency investments

12:00 – 12:30

90-Day Strategic Action Plan

Each advisor finalizes 3 Growth Priorities, 1 Operational Efficiency Initiative, 1 Revenue Expansion Strategy & 1 Succession Step