



**Summer Celebration 2025:**  
**All In: One Vision, One Team, One Future**  
**Producer Agenda**

**Tuesday, July 15<sup>th</sup>**

Who	Time	Location	Session	
<b>Everyone</b>	10:30am – 11:30am (60 minutes)	100 N. Broadway, Lobby	<b>Arrival / Pick-Up Name Badges</b> <b>Hosts:</b> <i>Marcy Julius, Director of HR, Stephanie Curtis, HR and Payroll Specialist, and Cindy West, Lead HR Representative</i>	
	11:30am – 12:30pm (60 minutes)	100 N. Broadway, 1 <sup>st</sup> Floor Lobby	<b>Lunch and Summer Celebration Kick-Off</b> <b>Hosts:</b> <i>Paul Larson, Larson CEO, Mitch Wood, President of Intrua, and Colin Wiens, President of Larson Financial Group</i>  Welcome to Summer Celebration 2025! This kickoff session will ignite us in the spirit of being “All In.” In addition to emphasizing how each person and every department plays a vital role in our united mission of serving our clients, we’ll lean in on how we each contribute to a thriving, collaborative future.	
<b>10 Minute Break – Head to 7<sup>th</sup> Floor for Next Session</b>				
<b>Producers</b>	12:40 – 1:35pm (55 minutes)	100 N. Broadway, 7 <sup>th</sup> Floor	<b>Investment and Market Update: Part 1</b> <b>Hosts:</b> <i>Sam Lawhon, Chief Investment Officer, and Steve Moro, Director of Larson Tax Partners, and Jeff Shultz, Senior Retirement Plan Specialist</i>  This dynamic session will cover market trends, tax strategies, and retirement planning, highlighting how investment and tax strategies can help advisors deliver comprehensive solutions to their clients.	
	<b>10 Minute Break</b>			
	1:45 – 2:40pm (55 minutes)	100 N. Broadway, 7 <sup>th</sup> Floor	<b>Investment and Market Update: Part 2</b> <b>Hosts:</b> <i>Sam Lawhon, Chief Investment Officer, and Jonathan Aal, Head of Credit Research, Smith Capital, in partnership with First Trust</i>  Fireside-style chat on market trends with time for Q&A.	
<b>10 Minute Break</b>				
	2:50 – 3:45pm (55 minutes)	100 N. Broadway, 7 <sup>th</sup> Floor	<b>Family Office and Legacy Planning</b> <b>Hosts:</b> <i>Paul Larson, Larson CEO, and Alex Davis, Partner and Senior Financial Advisor</i>  Providing a family-office style service can help boost your business to the next level. Instead of just serving an individual client, you’re establishing relationships with the whole family.	

<b>10 Minute Break</b>			
	3:55 – 4:50pm (55 minutes)	100 N. Broadway, 7 <sup>th</sup> Floor	<p><b>Women and Finance: The Future of Wealth is Female</b>  <b>Hosts:</b> <i>Amy Buchheit, VP of Intrua, and Courtney Garner, Director of Wealth Planning at Intrua</i></p> <p>Learn about the rapid growth of women's economic influence. How are financial advisors evolving to meet the unique needs of this powerful client segment? By understanding changing dynamics, advisors can build trust, close the investment gap, and capture a share of the billions in unmanaged female wealth.</p>
<b>Break: Check in to Hotel / Head Over to The Puttshack</b>			
Everyone	6:30pm – 8:30pm (2 hours)	The Puttshack, located at The Foundry, 3730 Foundry Way, St. Louis, MO, 63110	<p>Fun Night and Dinner at the Puttshack</p> <p>Two hours of unlimited mini golf on two courses, with food and beverages.</p> <p>For out-of-town guests, shuttle buses will take employees from 100 N. Broadway to Live! by Loews to check into their hotel rooms. From the hotel, buses will leave for The Puttshack between 5:45 – 6:15pm. The last bus leaves The Puttshack at 8:45pm. If anyone wishes to stay later, they will be responsible for getting back to the hotel.</p>

## Wednesday, July 16<sup>th</sup>

Who	Time	Location	Session
Optional	7:45am – 8:15am (30 minutes)	Live! by Loews, Stadium Room	<p><b>Prayer Session</b>  <b>Hosts:</b> <i>Paul Larson, Larson CEO</i></p> <p>Optional prayer session before breakfast and the Town Hall Meeting.</p>
Everyone	8:15am – 9:15am (60 minutes)	Live! by Loews, Cardinal's Ballroom	<p><b>Buffet Breakfast Session: The Power of Deep Discovery</b>  <b>Hosts:</b> <i>George Amidon, Managing Partner at JAM Consulting Group, in partnership with Invesco</i></p> <p>Learn how fanatical curiosity can drive more meaningful connections: whether it's externally with clients, or internally with colleagues.</p>
<b>15 Minute Break</b>			
Everyone	9:30am – 11:00am (1 hour 30 minutes)	Live! by Loews, Cardinal's Ballroom	<p><b>Q2 Town Hall Meeting</b></p> <p>Quarterly Town Hall Meeting! This is more than just an update, it's a rallying moment to feel inspired, empowered, and aligned.</p>
<b>30 Minute Break: Head Over to 100 N. Broadway Grab a Boxed Lunch from the 1<sup>st</sup> Floor and Head into Producer Speed Dating</b>			
Producers	11:30am – 1:30pm (2 hours)	100 N. Broadway, 1 <sup>st</sup> Floor	<p><b>Producer Speed Dating</b>  <b>Hosts:</b> <i>Summer Celebration Sponsor Partners</i></p> <p>Producers meet with our vendor sponsors and learn about various solutions to fit their clients' needs.  <i>CSAs are welcome to attend this session if they would like!</i></p>
<b>10 Minute Break – Head to 7<sup>th</sup> Floor for Next Session</b>			

Producers	1:40pm – 2:15pm (45 minutes)	100 N. Broadway, 7 <sup>th</sup> Floor	<p><b>Providing Peace of Mind through Smart Planning Strategies</b>  <b>Hosts:</b> <i>Brandon Barfield, Director of Student Loan Professor, and Justin Nabity, Partner and Senior Financial Advisor, Physicians Thrive</i></p> <p>Hear about recent student loan updates and best strategies from Student Loan Professor. We'll also address burnout in healthcare professions and importance of mental health for physicians. Provide your clients with peace of mind through smart planning.</p>
	<b>10 Minute Break</b>		
	Producers	2:25pm – 2:30pm (5 minutes)	100 N. Broadway, 7 <sup>th</sup> Floor
Producers		2:30pm – 3:45pm (1 hour 15 minutes)	100 N. Broadway, Various Breakouts
	<b>10 Minute Break</b>		
Producers	3:55pm – 4:50pm (55 minutes)	100 N. Broadway, 7 <sup>th</sup> Floor	<p><b>Cyber Security for Advisors</b>  <b>Hosts:</b> <i>Page Adlington, Senior Manager at Schwab, Alec McDaniel, Director of IT, and Chris Petersen, IT Systems Administrator</i></p> <p>As a member of Schwab's technology consulting team, Ms. Page Adlington provides hands-on guidance and consulting support to Advisors. Learn about the latest cyber security threats and how to help protect your clients from being scammed. Come with questions!</p>
	<b>Break – Head over to Live! by Loews</b>		
Everyone	6:00pm – 7:00pm (1 hour)	Live! by Loews, 2 <sup>nd</sup> Floor Terrace	<p><b>Cocktail Hour</b></p> <p>Appetizers and open bar. You are welcome to bring a guest!</p>
	7:00pm – 8:30pm (1 hour 30 minutes)	Live! by Loews, Cardinal's Ballroom	<p><b>Dinner and Awards Banquet</b>  <b>Hosts:</b> <i>Paul Larson, Larson CEO, Mitch Wood, President of Intrua, and Colin Wiens, President of Larson Financial Group</i></p> <p>Dinner and awards banquet. You are welcome to bring a guest!</p>
	8:30pm – 9:30pm (1 hour)	Live! by Loews, 2 <sup>nd</sup> Floor Terrace	<p><b>Post-Banquet Cocktail Hour</b></p> <p>Open bar after the banquet. Guests welcome!</p>

# Thursday, July 17<sup>th</sup>

Who	Time	Location	Session
Everyone	7:30am – 8:45am (1 hour 15 minutes)	100 N. Broadway, 1 <sup>st</sup> Floor Lobby	<b>Casual Breakfast Buffet: Team Building and Camaraderie</b>  Enjoy a casual breakfast with your teammates.
Shareholders	7:30am – 8:30am (1 hour)	100 N. Broadway, 2 <sup>nd</sup> Floor Large Conference Room	<b>Shareholder Breakfast Buffet:</b> <b>Hosts:</b> <i>Paul Larson, Larson CEO</i>  Shareholders invited to join Paul for a breakfast session.
<b>Break / Head to 7<sup>th</sup> Floor for Next Session</b>			
Producers	9:00am – 9:45am (45 minutes)	100 N. Broadway, 7 <sup>th</sup> Floor	<b>Advisor Case Cup Winners and Q&amp;A</b> <b>Hosts:</b> <i>Rick Frith, Partner and Senior Financial Advisor, and Jimmy Trebisovsky, Senior Financial Planner</i>  The winners of the Advisor Case Cup are announced and presented with the Case Cup Trophy! The winning team presents their solve and attendees ask questions about strategies.
<b>15 Minute Break / Head Downstairs</b>			
Everyone	10:00am – 10:45am (45 minutes)	100 N. Broadway, 1 <sup>st</sup> Floor Lobby	<b>Closing Message and Service Project Introduction</b> <b>Hosts:</b> <i>Paul Larson, Larson CEO, Mitch Wood, President of Intrua, and Colin Wiens, President of Larson Financial Group</i>
<b>Board Charter Buses to Gateway 180</b>			
Everyone	11:00am – 3:00pm (4 hours)	Gateway 180 1000 N 19 <sup>th</sup> St, St. Louis, MO 63106	<b>Service Project and Lunch at Gateway 180</b> <b>Hosts:</b> <i>Jane Kohler, Senior Executive Assistant, and Matthew Jennings, Project Manager</i>  Together we'll renovate and install garden beds and enhance outdoor areas by refreshing landscaping. We'll also host a kid's camp with crafts and games and grill out lunch for residents and volunteers. Our goal is to create a welcoming, family-friendly environment for the shelter's residents. Dress for the weather!
<b>Thank You for Attending!</b> Summer Celebration Officially Ends			



# Thank You to Our 2025 Summer Celebration Sponsors!

## GOLD



## SILVER



## BRONZE



We're grateful for your support in making this event possible.