

PRODUCERS AGENDA

LARSON SUMMER CELEBRATION



Wi-Fi Network: Sonesta_Conference
Password: Larson2026

DAY ONE *Tuesday, August 4th*

10:30a — 11:30a
60 MINUTES

Arrival & Badge
Pick-Up

THE R CLUB

11:00a — 12:30p
90 MINUTES

Lunch

KHORASSAN MAIN BALLROOM

12:30p — 1:15p
45 MINUTES

Kickoff Message

KHORASSAN MAIN BALLROOM

LED BY: Paul Larson and Bing Dempewolf

Welcome message from our CEO, Paul Larson, and Chief People Officer, Bing Dempewolf.

BREAK
1:15p — 1:30p

1:30p — 3:30p
120 MINUTES

Sponsor Speed
Dating

BREAKOUT ROOMS

Meet one-on-one with our Gold Sponsors to discover valuable resources, build relationships, and explore new opportunities for your practice. You'll have 20 minutes with each sponsor with 4 minutes in between.

BREAK
3:30p — 3:45p

3:45p — 5:00p
75 MINUTES

AI's Ripple Effects

REGENCY ROOM

LED BY: Ryan Issakainen, Exchange Traded Fund Strategist, Senior Vice President at First Trust

Companies are investing billions to build out artificial intelligence capabilities. Ryan shares First Trust's perspective on various investment themes that may benefit—either directly or indirectly—in the years ahead.

BREAK

4:45p — 6:00p

6:00p — 7:00p
60 MINUTES

Cocktail Reception

ZODIAC ROOM (ROOFTOP)

★ *Childcare provided in the Lenox Room*

Kick off the evening by reconnecting with colleagues over drinks while enjoying beautiful rooftop views before dinner begins.

7:00p — 8:30p
90 MINUTES

Dinner & Awards Gala

STARLIGHT BALLROOM (ROOFTOP)

★ *Childcare provided in the Lenox Room*

Together we'll reflect on two decades of growth, purpose, and impact. Through a special anniversary video and personal remarks, we'll celebrate the milestones that have shaped Larson's story.

8:30p — 9:30p
60 MINUTES

Open Bar / Networking

ZODIAC ROOM (ROOFTOP)

End the evening by connecting with colleagues, sharing stories from the day, and celebrating together in a relaxed rooftop setting.

DAY TWO *Wednesday, August 5th*

7:45a — 8:30a
45 MINUTES

Prayer Breakfast (Optional)

REGENCY ROOM

LED BY: Kenny DeShields (music) and Mick Baker (leading)

Start the day with a time of worship, encouragement, and prayer.

7:45a — 8:30a
45 MINUTES

Breakfast

KHORASSAN WEST BALLROOM

Enjoy breakfast while reconnecting with colleagues before the day's sessions begin.

BREAK

8:30a — 8:45a

8:45a — 9:30a
45 MINUTES

The Human Flourishing Program

KHORASSAN MAIN BALLROOM

LED BY: Dr. Brendan Case, Associate Director for Research from the Human Flourishing Program at Harvard University
Discover what research from Harvard's Human Flourishing Program reveals about living a meaningful, purpose-driven life. Dr. Brendan Case will share practical insights on the habits and relationships that help individuals and organizations flourish.

9:30a — 9:40a
10 MINUTES

Volunteer Instructions

KHORASSAN MAIN BALLROOM

LED BY: Aileen Beno-Lietz

Everything you need to know before heading to Warrior Impact Time, including logistics, and expectations.

TRAVEL TIME

9:40a — 10:00a

10:00a — 1:00p
3 HOURS

Volunteer Event & Lunch

OFFSITE

Hope Nation Church, 4001 Maffitt Ave,
St. Louis, MO 63113

Warrior Impact Time

TRAVEL TIME

1:00p — 1:20p

BREAK

1:20p — 2:30p

2:30p — 3:15p
45 MINUTES

Update from Larson Capital Management

REGENCY ROOM

LED BY: Jon White and Alyssa Johnson

Get the latest updates on Larson Capital Management, including current developments, investment opportunities, and what's on the horizon.

BREAK

3:15p — 3:30p

3:30p — 4:15p
45 MINUTES

Creating a Referral Culture

REGENCY ROOM

LED BY: Jay Wampler, Director, Sr. Business Management Consultant at Schwab, & Ben Maloney

Creating a referral culture will help you to develop and implement a firm-wide growth strategy based on increasing referrals. Learn insights into how compelling and memorable stories enable you, your team, and clients to amplify your firm's reputation within the community you serve.

BREAK

4:15p — 4:30p

4:30p — 5:15p
45 MINUTES

Succession Planning

REGENCY ROOM

LED BY: Alex Brockman

Learn why succession planning is one of the most important long-term decisions for your practice - and for your clients. Alex will discuss legacy-protecting strategies so you can better help your clients, colleagues and yourself prepare for this next chapter.

BREAK

5:15p — 5:30p

TRAVEL

5:30p — 6:00p

6:00p — 9:30p
3.5 HOURS

City Museum Adventure & Vespers: Worship Night

OFFSITE

Explore one of St. Louis' most iconic attractions while enjoying a BBQ buffet dinner. Starting at 8:00, Paul will share an inspiring update from the Larson Financial Foundation, followed by a time of worship.

TRAVEL TIME

9:30p — 10:00p

DAY THREE *Thursday, August 6th*

8:00a — 9:00a
60 MINUTES

**Shareholder Breakfast
Presentation (Shareholders Only)**

REGENCY ROOM

LED BY: Paul Larson, CEO

Hear company updates, celebrate recent accomplishments, and look ahead at Larson's vision and strategic priorities.

8:00a — 9:00a
60 MINUTES

Breakfast

KHORASSAN WEST BALLROOM

Enjoy breakfast while reconnecting with colleagues before the day's sessions begin.

BREAK

9:00a — 9:15a

8:30a — 10:30a
120 MINUTES

**Doctors Only Video
(Optional)**

PLAZA ROOM

LED BY: Doctors Only Producers

Record a short "Doctors Only" introduction video to help expand our physician-focused marketing efforts. Producers who would like to participate are welcome to do a 1–2-minute elevator pitch on how they serve doctors, physicians, and other elite medical professionals.

9:15a — 10:15a
60 MINUTES

**Best in Class
Strategies**

REGENCY ROOM

LED BY: Colin Wiens and Alex Davis

Hear proven ideas and practical strategies from top-performing advisors that you can begin applying immediately.

BREAK

10:15a — 10:30a

10:30a — 11:30a
60 MINUTES

**Income Tax Driven Wealth
Transfer Strategies**

REGENCY ROOM

LED BY: Lauren Surdyke, Partner and Attorney, and David Simmons, Partner and Attorney, UB Greensfelder

Earn CFP CE credit while learning tax-efficient wealth transfer strategies you can put to work for your clients.

BREAK

11:30a — 11:45a

11:45a — 1:15p
90 MINUTES

Lunch, Town Hall, &
Wrap Up

KHORASSAN MAIN BALLROOM

LED BY: Paul Larson, Bing Dempewolf, Sam Lawhon, & Jon White

We'll wrap up Summer Celebration by sharing key updates, answering questions, and looking ahead to the opportunities before us.

TRAVEL TO AIRPORT

1:30p

1:30p+

(Optional) Offsite Team
Outings

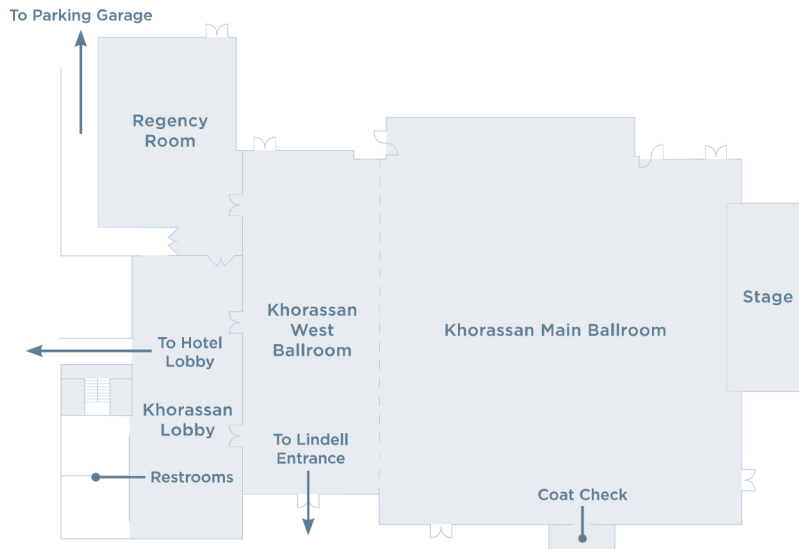
OFFSITE

LARSON

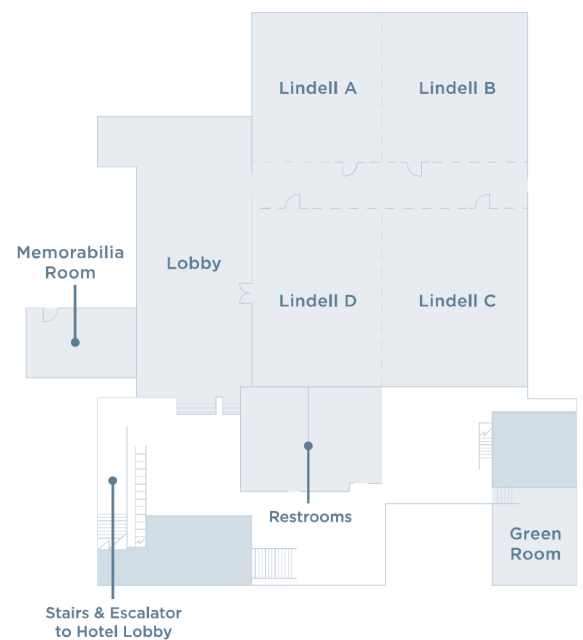


MEETING ROOM PLANS

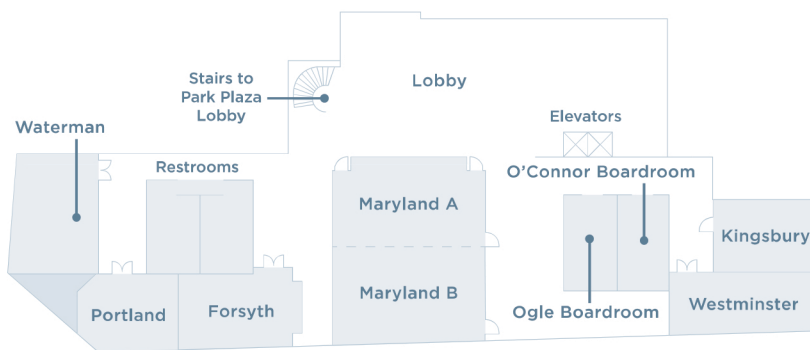
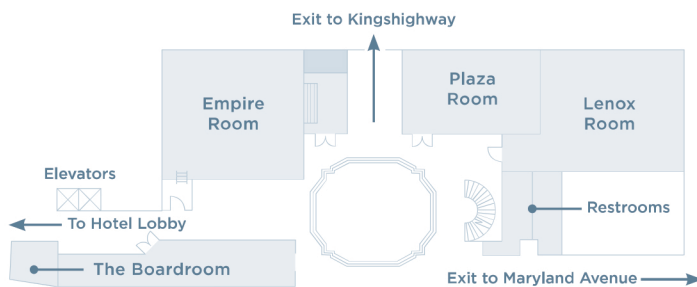
KHORASSAN BALLROOM & REGENCY ROOM



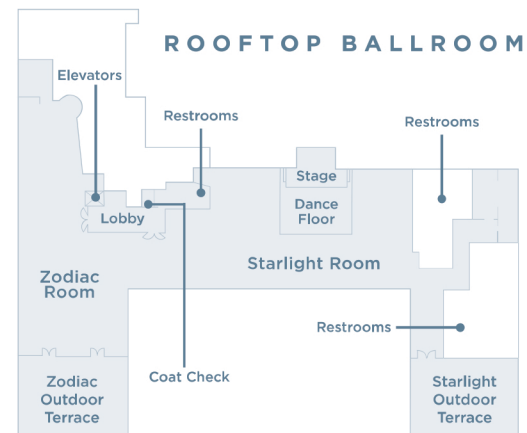
LINDELL BALLROOM



THE CONFERENCE CENTER



ROOFTOP BALLROOM



The Chase Park Plaza

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