ARGOSY | KEYBASE
WEALTH MANAGEMENT

THURSDAY, SEPTEMBER 24, 2026

2026 Fall Conference

Where Strategy Meets the Finish Line.

Conference agenda | 8:00am - 6:00pm

Morning program

8:00am - 9:00am
60 minutes

Registration & Breakfast

9:00am - 9:10am
10 minutes

Opening Remarks & Welcome

Speaker: Krissy Sukhraj, Keybase Financial Group

Welcome to the 2026 Fall Conference! Join us as we outline the agenda, introduce our esteemed speakers, and share key objectives to ensure a productive and engaging experience for all participants. The theme of the conference is Where Strategy Meets the Finish Line.

9:10am - 9:55am
45 minutes

FRANKLIN TEMPLETON INVESTMENTS (FUND CO PRESENTATION)

Constructing Resilient Portfolios: Multi-Asset Collaboration and the Road Forward

Speaker: Michael Dayan - VP of Portfolio Manager

Michael Dayan will be providing market-related updates as well reviewing the value and options available for building portfolios: full multi-asset solutions, core multi-asset solutions, asset class building blocks.

9:55am - 10:40am
45 minutes

CI GAM (FUND CO PRESENTATION)

Navigating CRM 3: Increasing Transparency, Increasing Trust

Speaker: Gaby Gooding - Director of Advisor Development

CRM3 Introduces a new level of fee transparency that will change how clients evaluate the cost of advice and prompt more frequent, value-focused conversations. This session helps advisors approach CRM3 with clarity and confidence, using practical framing to contextualize fees, articulate outcomes, and position the full scope of their advice. The goal is to turn transparency into a trust-building opportunity that strengthens long-term client relationships.

Morning program continued

10:40am - 11:00am
20 minutes

Break

11:00am - 11:45am
45 minutes

DYNAMIC FUNDS PRESENTATION (FUND CO PRESENTATION)

The quest for the 6% yield, how to build portfolios that pay like a pension

Speaker: Craig Maddock, VP & Senior Portfolio Manager of Multi-Asset Management Team

As clients increasingly seek reliable income in retirement, traditional portfolio approaches may not be enough. In this presentation, portfolio manager Craig Maddock examines how institutional-style portfolio construction, alternative income sources, private credit, option strategies, and diversified income solutions can work together to help create more stable and sustainable retirement cash flow.

11:45pm - 1:00pm
75 minutes

Lunch

Afternoon program

1:00pm - 1:15pm
15 minutes

“Building Wealth at Full Stride” - Afternoon Opening Remarks

Speaker: Dax Sukhraj, Keybase Financial Group

A brief welcome back to attendees following lunch, designed to re-energize the room and set the stage for the afternoon program. The remarks will acknowledge the evolving landscape facing financial advisors, reinforce the importance of trusted advice and client relationships, and encourage participants to identify practical insights they can apply to their practices.

Afternoon program continued

1:15pm - 2:00pm

45 minutes

MACKENZIE INVESTMENTS PRESENTATION (FUND CO PRESENTATION)

Global Investing Powered by Quant Models and Human Insight!

Speaker: Cheryl Zhao, Investment Director for Mackenzie GQE team.

In today's rapidly evolving investment landscape, quantitative investing is no longer confined to traditional factor models. Advances in machine learning, natural language processing, and alternative data are now enabling investors to uncover insights that were previously challenging to identify through conventional research alone. Join us as we explore how the team's global, all-weather investment process integrates data-driven signals with portfolio management expertise to navigate changing market environments. We will also discuss how this combination can help identify opportunities across regions and market cycles while seeking to deliver more consistent investment outcomes in the long term.

2:00pm - 2:15pm

15 minutes

Break

2:15pm - 3:00pm

45 minutes

FIDELITY PRESENTATION (FUND CO PRESENTATION)

Stay Ahead of the Evolving Investor Landscape: Trends, Insights, and Strategies for Advisors

Speaker: Michelle Munro - Director, Tax and Retirement Research

Discover how advisors can stay ahead in a rapidly changing environment. Explore emerging investor needs driven by demographics, retirement trends, intergenerational expectations, and rising health-care costs. Gain actionable insights and conversation starters to strengthen client relationships and elevate your value.

3:00pm - 3:15pm

15 minutes

Closing Remarks

Speaker: Dax Sukhraj, Keybase Financial Group

3:15pm - 6:00pm

Horse Races & Reception