

2026 NAIFA-IOWA ANNUAL CONVENTION

COURTYARD BY MARRIOTT
ANKENY, IOWA

WEDNESDAY, SEPTEMBER 23

Doors Open 	12:30 - 1:00 p.m.
Your Ethos is Always on Trial Brian Gillette	1:00 - 2:00 p.m.
Break	2:00 - 2:15 p.m.
Exploring AI's Transformative Potential Jonathan Bauman	2:15 - 3:15 p.m.
Networking Break 	3:15 - 3:30 p.m.
2026 Social Security Updates and Options for Solvency Marcia Mantell	3:30 - 4:30 p.m.
Mentor Meeting	5:00 - 6:00 p.m.
Welcome Reception 	6:00 - 8:00 p.m.

All sessions are approved for 1 CE credit, except Market Outlook with Greg Brunk.

Your Ethos is Always on Trial with Brian Gillette is approved for 1 Ethics credit.



NETWORK: Bonvoy Conference
PASSWORD: courtyard

Visit
Event
Website



THURSDAY, SEPTEMBER 24

Registration & Breakfast	7:15 - 8:00 a.m.
Welcome & Opening Ceremony	8:00 - 8:30 a.m.
How Passive Investing is Destroying Financial Markets Mike Green	8:30 - 9:30 a.m.
Break with Exhibitors 	9:30 - 9:45 a.m.
Breakout Sessions	9:45 - 10:45 a.m.
- Washington DC Update: The OBBBA, SECURE Acts and More - Ben Totel and Kevin Hansen - Connecting the Dots Between Social Security and Medicare - Marcia Mantell	
Break with Exhibitors 	10:45 - 11:00 a.m.
Advocate, Educate, Differentiate NAIFA President & NAIFA IFAPAC & Membership	11:00 a.m. - 12:00 p.m.
Annual Meeting & Awards 	12:00 - 1:00 p.m.
Dessert Break with Exhibitors	1:00 - 1:30 p.m.
Breakout Sessions 	1:30 - 2:30 p.m.
- Market Outlook - Greg Brunk - Preventing Financial Exploitation for Financial Professionals - Jessica McGraw	
Break with Exhibitors 	2:30 - 3:00 p.m.
Determining Your Client's Retirement Income Styles Wade Pfau	3:00 - 4:00 p.m.
Final Announcements	4:00 - 4:30 p.m.