

# GLACIER SUMMIT

September 15–17, 2026 ♦ Whitefish, Montana

## Preliminary Agenda

### Tuesday | September 15 | 2026

#### 3:00 pm – 6:00 pm **Registration**

Visit the Stack Financial Management (SFM) Registration Booth to check in and gather your registration materials.

#### 5:00 pm – 8:00 pm **Welcome Reception**

Join the teams of SFM & InvesTech Research at Grouse Mountain Lodge for live music and heavy hors d'oeuvres.

### Wednesday | September 16 | 2026

#### 8:00 am – 12:00 pm **Registration**

If you are unable to check in at the registration booth on Tuesday, register Wednesday morning.

#### 9:00 am – 11:45 am **General Sessions**

Our array of presentations will begin Wednesday morning. See our speaker highlights to get a sneak peek at the line-up.

#### **Risk-Management – Why Your Financial Survival May Depend On It**

Zach Jonson, CFA                      Annell Danczyk, CFA  
Joe Laszewski, CFA, CPA

#### **The Most Valuable Lessons from Over 100 Years of Wall Street History**

James Stack & Claire Cantalupo

#### **The SFM Experience – The Power of Concierge Wealth Management**

Dillon Manley, CFP® & Aimee Weller

#### 11:45 am – 1:00 pm **Lunch Break**

#### 1:00 pm – 3:30 pm **Afternoon Workshops**

##### **2026-27 Market Outlook**

Guest Speaker – Sam Stovall, CFRA

##### **Glacier Park, Grizzlies, Mountain Goats, and Wolverines**

Guest Speaker – Doug Chadwick, Wildlife Biologist & National Geographic Contributor

##### **After the Bubble – How to Identify that “Once-in-a-Lifetime” Buying Opportunity**

Zach Jonson, CFA                      Annell Danczyk, CFA  
Joe Laszewski, CFA, CPA

### Thursday | September 17 | 2026

#### 9:00 am – 11:45 am **General Sessions**

Speaker presentations will continue Thursday morning and conclude early afternoon.

#### **Using Stock Market History as Virtual Valium**

Guest Speaker – Sam Stovall, CFRA

#### **The Critical Technical Indicators to Watch Today**

Claire Cantalupo, InvesTech Research

#### **Bulletproofing Your Digital Identity**

Andrew Porter, CISSP®

#### **Secrets for Safety-First Wealth Management through Market Extremes**

Zach Jonson, CFA                      Annell Danczyk, CFA  
Joe Laszewski, CFA, CPA              Dillon Manley, CFP®  
Moderator: James Stack

#### 11:45 am – 12:45 pm **Lunch Break**

Break for lunch and then your afternoon is free until the evening events.

#### 5:30 pm – 6:30 pm **Cocktail Reception**

Meet and socialize with other investors before our conference finale.

#### 6:30 pm – 8:30 pm **Gala Dinner & Fireside Chat** **Two Market Historians Take a Stroll Down Memory Lane**

Join us in the Grouse Mountain Continental Divide room for dinner followed by a fireside chat. Our CIO, Zach Jonson will host a spirited discussion between two legends of Wall Street: CEO of Stack Financial Management and President of InvesTech Research, James Stack, and special guest speaker Sam Stovall, CFRA's Chief Investment Strategist.

### AFTER THE CONFERENCE

### Friday | September 18 | 2026

#### 9:00 am – 4:00 pm **SFM & InvesTech Office Visit**

Tour our office at your leisure and meet members of the SFM and InvesTech teams.

*This is a preliminary agenda and is subject to change.*