

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**

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

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

Glacier Park, Grizzlies, Mountain Goats, and Wolverines

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

2026-27 Market Outlook

Guest Speaker – Sam Stovall, CFRA

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

9:30 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.