Summit Schedule

Tuesday | September 15

3:00 PM – 6:00 PM **CONFERENCE REGISTRATION**
Grouse Mountain Lodge Lobby until 4:30 pm, then it will move to the Continental Divide Foyer until 6:00 pm.
Visit the Stack Financial Management (SFM) registration desk to check in and gather your registration materials.

5:00 PM – 8:00 PM **WELCOME RECEPTION**
Continental Divide Room [by the Grouse Lobby]
The week's events will kick off with a welcome reception on Tuesday evening, where guests are invited to embrace a Western Chic dress theme (optional). Enjoy cocktails and heavy hors d'oeuvres accompanied with live music by special guest musician, John Dunnigan.

Wednesday | September 16

8:00 AM – 3:30 PM **CONFERENCE REGISTRATION**
Event Center Foyer
If you missed registration on Wednesday, a member of our team will be available at our registration booth outside of the conference center.

8:30 AM – 3:20 PM **GENERAL SESSIONS**
Event Center

8:30 AM **OPENING ADDRESS**
Join the Executive Team as they officially welcome attendees to the 2026 Glacier Summit!
James Stack, President and CEO
Zach Jonson, CFA, Vice President & CIO
Annell Danczyk, CFA, Vice President & Sr. Portfolio Mgr.
Stack Financial Management

8:40 AM **ACTIVE RISK MANAGEMENT – WHY YOUR FINANCIAL SURVIVAL MAY DEPEND ON IT**
With record amounts of leverage, overvaluation, and index concentration, the stakes have seldom been higher for investors than they are today. Join the SFM Portfolio Management Team as they dive into the major risks and critical dynamics at play in today's volatile market. More importantly, they will share proven strategies for capitalizing on late-stage bull market opportunities while providing a clear roadmap for managing risk through the next major bear market.
Zach Jonson, CFA, Vice President & CIO
Annell Danczyk, CFA, Vice President & Sr. Portfolio Mgr.
Joe Laszewski, CFA, CPA, Sr. Portfolio Mgr.
Stack Financial Management

9:30 AM **REFRESHMENT BREAK**

9:45 AM **THE MOST VALUABLE LESSONS FROM OVER 100 YEARS OF WALL STREET HISTORY**
Join InvesTech Founder, James Stack, and Senior Writer & Research Analyst, Claire Cantalupo, on a journey through the most significant market periods of the last century – including the 1990s Tech Bubble, the 1987 Crash, the Nifty-Fifty Era of the 1970s, the Go-Go Fund mania of the 1960s, and all the way back to the Roaring '20s and the 1929 Crash. Learn the historical mistakes that caused devastation to investors' portfolios in the past and what tactics and tools you can use to avoid them today.
James Stack, President
Claire Cantalupo, Sr. Writer & Research Analyst
InvesTech Research

10:30 AM **THE SFM EXPERIENCE: A CONCIERGE APPROACH TO WEALTH MANAGEMENT**
At SFM, our clients are at the center of everything we do. Learn how our Team delivers tailored wealth management expertise through exceptional service, thoughtful guidance, and lasting relationships. Join our Director of Client Relations, Aimee Weller, and Senior Wealth Strategist, Dillon Manley, to discover how personalized concierge hand-holding can make all the difference as you plan your financial future.
Aimee Weller, Director of Client Relations
Dillon Manley, CFP ®, CPWA ®, Sr. Wealth Strategist
Stack Financial Management

11:00 AM **MONTANA BBQ LUNCH**
Continental Divide Room

12:15 PM **AFTER THE BUBBLE – HOW TO IDENTIFY THAT "ONCE-IN-A-LIFETIME" BUYING OPPORTUNITY**

Extreme risk always leads to great investment opportunities. In this lively workshop, the SFM Portfolio Managers will review the red flags signaling bear market and recession risks. In addition, our seasoned team will reveal the time-tested tools and warning flags that can indicate when a bear market bottom is in place and help you identify that next "once-in-a-lifetime" buying opportunity.
Zach Jonson, CFA, Vice President & CIO
Annell Danczyk, CFA, Vice President & Sr. Portfolio Mgr.
Joe Laszewski, CFA, CPA, Sr. Portfolio Mgr.
Stack Financial Management

1:00 PM **STRETCH BREAK**

1:05 PM **2027 OUTLOOK: IS IT TIME TO BUY OR BAIL?**

The S&P 500 recorded a "three-peat" in 2025, or three successive years of double-digit gains. What is the likelihood of scoring a "four-peat" in 2026, something that has happened only three times since 1942? As we approach the 4th year of this bull market, valuations remain in nose-bleed territory, the "Buffett Indicator" is near its all-time high, and the first move by a new Fed chair in the past 50 years has been to raise rates, not lower them. Yet EPS growth expectations remain exceptional and the return for the S&P 500 period in the 12-months after midterm elections not only never declined but also averaged 16%! Sam Stovall, CFRA's Chief Investment Strategist, will discuss his market outlook for the year ahead and why the Old Milwaukee Beer tagline may be prophetic.
Sam Stovall, Chief Investment Strategist
CFRA Research

2:05 PM **REFRESHMENT BREAK**

2:20 PM **GLACIER PARK, GRIZZLIES, MOUNTAIN GOATS, AND WOLVERINES: A TOUR ON THE WILD SIDE OF OUR WHITEFISH NEIGHBORHOOD**

Join Doug for a captivating look into his 50-plus years of research studying grizzly bears, mountain goats, and wolverines. Through firsthand stories and scientific insights, gain a deeper appreciation for the remarkable wildlife that inhabits Glacier National Park and the surrounding wilderness.
Doug Chadwick, Wildlife Biologist

Thursday | September 17

8:20 AM – 11:50 AM **GENERAL SESSIONS**
Event Center

8:20 AM **CONFERENCE ANNOUNCEMENTS**

8:30 AM **THE CRITICAL TECHNICAL INDICATORS TO WATCH TODAY**

Gain a new understanding of the crucial role InvesTech's technical indicators play in a Safety-First investing strategy as Senior Research Analyst, Claire Cantalupo, steps through the themes and critical warning flags that InvesTech Research uses to confirm when a bear market has begun.
Claire Cantalupo, Sr. Writer & Research Analyst
InvesTech Research

9:00 AM **USING STOCK MARKET HISTORY AS VIRTUAL VALIUM**

Emotions are an investor's worst enemy, causing them to buy at the top, sell at the bottom, and play "whack a mole" in between. However, history shows that by being aware of market fluctuations and embracing a rules-based investment approach, one can extract their emotions from the investment process, improve performance, and reduce volatility. Sam Stovall, Chief Investment Strategist of CFRA, and author of The Seven Rules of Wall Street, will show that an understanding of stock market history can serve as "virtual Valium," by calming your nerves.
Sam Stovall, Chief Investment Strategist
CFRA Research

9:45 AM **REFRESHMENT BREAK**

10:00 AM **BULLETPROOFING YOUR DIGITAL IDENTITY**

Join Stack Financial Management's Chief Information Security Officer, Andrew Porter, as he analyzes the impact of Artificial Intelligence in the cybersecurity world. Understand the evolving tactics that are being used by cybercriminals to steal individuals' identity and wealth, as well as a simple –yet very effective– strategy you can use to safeguard yourself.
Andrew Porter, CISSP®, Chief Information Security Officer
Stack Financial Management

10:45 AM STRETCH BREAK

10:50 AM SECRETS FOR SAFETY-FIRST WEALTH MANAGEMENT THROUGH MARKET EXTREMES

In this interactive closing session moderated by SFM Founder and CEO James Stack, our Portfolio and Wealth Management Team take center stage to tackle audience questions and share practical insights for protecting wealth, managing risk, and navigating market extremes with discipline and confidence.

Zach Jonson, CFA, Vice President & CIO
Annell Danczyk, CFA, Vice President & Sr. Portfolio Mgr.
Joe Laszewski, CFA, CPA, Sr. Portfolio Mgr.
Dillon Manley, CFP ®, CPWA ®, Sr. Wealth Strategist
James Stack, President & CEO
Stack Financial Management

11:50 AM SANDWICH BUFFET LUNCH & AFTERNOON FREE

Continental Divide Room

5:30PM COCKTAIL RECEPTION

Event Center

6:30PM GALA DINNER

Event Center

7:45PM FIRESIDE CHAT: TWO MARKET HISTORIANS TAKE A STROLL DOWN MEMORY LANE

Event Center

Join us for an evening of celebration, starting with a festive dinner followed by an intimate fireside chat. Our Chief Investment Officer, Zach Jonson, will host a spirited discussion and historical journey with two legends of Wall Street: our own James Stack, CEO of Stack Financial Management and President of InvesTech Research, and Sam Stovall, Chief Investment Strategist at CFRA.

James Stack, President and CEO, *Stack Financial Management*
Sam Stovall, Chief Investment Strategist, *CFRA Research*

FRIDAY | SEPTEMBER 18

9:30AM – 4:00PM SFM & INVESTECH OFFICE OPEN HOUSE

Visit with our team and enjoy snacks and refreshments. You'll have the opportunity to chat with fellow attendees and learn more about Stack Financial Management & InvesTech Research.

All Team Members
Stack Financial Management & InvesTech Research