

## 2025 LEADERSHIP SUMMIT

Wednesday, April 23  
Wynn Las Vegas

4:45PM – 5:00PM

**Emigrant Executive Welcome**  
**Jenny Souza**, CEO, Emigrant Partners

5:00PM – 8:00PM

**Cocktail Reception & Welcome Dinner**

Thursday, April 24  
Wynn Las Vegas

8:00AM – 8:45AM

**Breakfast**

8:45AM – 9:00AM

**Spotlight: Growth & Opportunity**  
**Jenny Souza**, CEO, Emigrant Partners

9:00AM – 9:45AM

**Setting the Stage: Strategic Drivers of Growth & a View into the Emigrant Network**

9:45AM – 10:30AM

**Dynamic Management & the Enduring Advisory Firm**  
**Mark Tibergien**, Board Member, E&Y, Pathstone, Nesvold Capital Partners  
Moderated by **Peter Nesvold**, Managing Partner, Nesvold Capital Partners

10:30AM – 11:00AM

**Refreshments & Networking Break**

11:00AM – 12:30PM

**Megatrend Power Sessions: Focused, 20min. sessions on four “Megatrends” that are re-shaping the wealth management industry**

- **Cracking the Code: Organic Growth & Digital Marketing** – Jason Carver, CFO, Pure Financial
- **The Future of M&A in Wealth Management** – Peter Raimondi, CEO, Dakota Wealth Management
- **The Emergence of AI in FinTech** – Matthew Harrigan, CEO, Company Ventures
- **Developing the NextGen of Leadership** – Ray Sclafani, CEO, ClientWise

12:30PM – 1:30PM

**Lunch**

1:30PM – 2:00PM

**Grow Your Business with True Alternatives**  
**Peter Nakada**, Chief Education Officer, Stone Ridge Asset Management

2:00PM – 2:45PM

**Game On: Private Market Opportunities in Sports**  
**Sal Galatioto**, President, Galatioto Sports Partners (“GSP”)



Thursday, April 24  
Wynn Las Vegas

2:45PM – 3:15PM

**Partner Firm Spotlights**  
**SteelPeak: Putting it into Practice: Access Emerging Opportunities in Sports –**  
Reza Zamani, CEO, SteelPeak  
**Meet Emigrant’s Newest Partner Firms: Principle Wealth Partners & Novare**  
**Capital Management**

3:15PM -- 3:45PM

**Refreshments & Networking Break**

3:45PM – 4:15PM

**Fireside Chat**  
**Howard P. Milstein**, Executive Chairman & CEO, Emigrant Bank  
**Jenny Souza**, CEO & President, Emigrant Partners

4:15PM – 5:00PM

**The Family Office of the Future: Strategies & Services for the “Ultra” UHNW**  
**Community**  
**Liz Nesvold**, Chair of Emigrant Partners & Vice Chair of Emigrant Bank

5:00PM – 6:00PM

**Break**

6:00PM – 7:00PM

**Cocktails**

7:00PM

**Dinner**

Friday, April 25  
Wynn Las Vegas

11:00AM – 4:00PM

**8AM Golf Invitational VIP Experience**