

NAPFA 2025 Large Firm Forum

Schedule-at-a-Glance

	Monday February 10, 2025	Tuesday February 11, 2025	Wednesday February 12, 2025
6:00 AM		Morning Activity	Morning Activity
6:30 AM			
7:00 AM		Networking Breakfast & Badge Pickup	Networking Breakfast
7:30 AM			
8:00 AM		Welcome & Keynote Session with Joel Rothman, Ph.D.	Welcome & Keynote Session with Rohit Bhargava
8:30 AM			
9:00 AM			
9:30 AM			
10:00 AM		Networking Break	Networking Break
10:30 AM		The Future of Wealth Management	Cybersecurity with James Carroll
11:00 AM			
11:30 AM			
12:00 PM		Lunch	Lunch
12:30 PM			
1:00 PM		Building Pathways to Success: Career Growth Ladders for Talent Attraction	Strategies to Grow Your Firm
1:30 PM			
2:00 PM			
2:30 PM		Succession Panel I: M&A	Lessons Learned for Transitioning Client Relationships
3:00 PM			Networking Break
3:30 PM			
4:00 PM		Networking Break	Succession Panel II: Internal Transfer
4:30 PM			
5:00 PM	Welcome Reception & Badge Pickup	Whiskey Tasting (Optional)	Closing Remarks
5:30 PM		Networking Reception	Relax & Refresh
6:00 PM			
6:30 PM			
7:00 PM		Networking Dinner	Closing Reception & Dinner
7:30 PM			
8:00 PM			
8:30 PM			