



**THE FOUNDERS ARENA**  
**Founders Fuel The Future**

# WealthTech Combine

October 8 - 9, 2024



[Register Here](#)



# October 8 Day 1

Location: Center for Visual and Performing Arts | 900 E Sanford St, Arlington, TX 76011

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## 11:30 AM: Arrival & Registration

## 12:00 PM: Welcome & Opening Remarks

Pamela Cytron, President, The Founders Arena

## 12:30 PM: Leading Mission Alignment: How to Lead Your Team in Achieving a Shared Mission

Tony Brock, Executive Director, National Medal of Honor Griffin Institute

## 01:30 PM: Unveiling the Fall 2024 WealthTech Cohort.

*Meet the six participating companies - Agent iQ, LemonadeLXP, Mammoth Technology, Practice Intel, Quinn, and Zeplyn.*

## 02:15 PM: Developing Relationships with the Help of AI

MJ Petroni, CEO, Cyborg Anthropologist and Digital Fluency Guide, Causeit, Inc.

## 02:30 PM: Networking Break

## 03:00 PM: Tech Fusion : Wealth and Beyond

Elena Carroll, Executive Ambassador, TFA

Stephanie Reilly, Senior Advisor and Business Consultant, SEI

Anthony Termini, SVP of Business Development - Fintech Partnerships, Morningstar

Christopher Hamilton, Head of Partnership Development, Aura

# October 8

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### **03:45 PM: Lone Star Capital: Scoring Big in Texas' Financial Boom**

Pamela Cytron, President, The Founders Arena

Barbara D'Amato, Founder & CEO, Trilogy Capital Corp. and Board Member at the State of Texas Economic Incentive Oversight Board

Ronnie Spellman, Executive Leader and Podcast Host, Business Decoded

Dave Stone, Co-Founder, First Rate

### **04:30 PM: City and EDC Spotlight: Arlington's Innovation Journey**

Pamela Cytron, President, The Founder Arena

Paul Carson, Chief Innovation and Entrepreneurship Officer, UTA

Michael Jacobson, President and CEO, Greater Arlington Chamber of Commerce

### **06:30 PM: Paddle and Prosper at Chicken N Pickle - Celebrating WealthTech in the Heart of Texas**

Location: Chicken N Pickle | 2965 State Hwy 161, Grand Prairie, TX 75052

*Transportation will be provided from CVPA to three local hotels, and from the three local hotels to Chicken N Pickle. Schedule below:*

- **5:00 pm CT:** Pick-up at CVPA
- **5:15 pm CT:** Drop-off at local hotels (Aloft, SpringHill Suites, and TownePlace Suites)
- **6:00 pm - 7:00 pm CT:** Pick-up at local hotels listed above and drop-off at Chicken N Pickle on a rotating schedule.
- **6:30 pm - 7:30 pm CT:** Drop-off at Chicken N Pickle
- **8:30 pm - 10:00 pm CT:** Pick-up at Chicken N Pickle and drop-off at local hotels on rotating schedule.

# October 9

## Day 2

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**08:00 AM: Continental Breakfast**

**09:00 AM: Communication as Competitive Advantage**

Jennifer Sertl, Founder and President, Agility 3R

**09:45 AM: Writer: Building Generative AI for the Enterprise**

MJ Petroni, AI Fluency Leader & Cyborg Anthropologist, [aifluency.guide](http://aifluency.guide)

Yasmin Sachee, GTM - Verticals Lead, Writer

**10:30AM: Commercial Networking Break**

**10:45AM: Investment Synergy PE, VC, and Corporate VC Strategies in WealthTech**

Kyle Carlson, Venture Portfolio and Commercialization Manager, SEI

Marshall Smith, Managing Director, First Rate Ventures

Kendrick Wakeman, Co-Founder and CEO, WealthTech Strategy Partners

**11:30 AM: How News Shapes Advisor Strategies and Client Expectations**

Aaron Berger, Founder, A/M Partners

Jennifer Sertl, President and Founder, Agility3R

Danny Peterson, Senior Director, Direct-To-Consumer Marketing, CNBC

Bryan Hasling, Financial Advisor, Modern Financial Planning

Dr. Sima Jannati, Assistant Professor of Finance and Real Estate, UTA

# October 9

Day 2

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## 12:15 PM: Lunch

## 01:00 PM: Founders Unplugged: Candid Conversations with the WealthTech Accelerator Cohorts

## 01:30 PM: Launchpad Leaders: Growing A Successful Corporate Innovation Mindset, Ecosystem and Culture

Hamza Qadir, Managing Director, The Founders Arena

Allie Carey, Chief Strategy Officer of Private Banking and Wealth Management, SEI

Trina Stone, Co-Founder, First Rate

Kevin Knull, President, TaxStatus

## 02:15 PM: Bringing Exponential Tech Into Enterprises: Integration, Alignment and Commercial Viability

MJ Petroni, AI Fluency Leader & Cyborg Anthropologist, [aifluency.guide](https://aifluency.guide)

## 03:00 PM: The Open Playbook: Q&A with the Audience

MJ Petroni, AI Fluency Leader & Cyborg Anthropologist, [aifluency.guide](https://aifluency.guide)

Pamela Cytron, President, The Founders Arena

## 03:30 PM: Closing Remarks & Open Networking