



ENRICH CONFERENCE 2025

Date: April 15th - 17th, 2025
Location: Omni Hotel at The Battery Atlanta, GA

TUESDAY, APRIL 15, 2025

Arrival and Check-In

6:00 - 8:30 PM | Welcome Buffet and Cocktails
Location: Outside Terrace Pool Deck

WEDNESDAY, APRIL 16, 2025

8:00 - 9:00 AM | Breakfast

Location: Ballroom A/B

9:00 - 9:20 AM | Opening Remarks

Rick Kent, CEO and Founder, Merit Financial Advisors
Kay Lynn Mayhue, President, Merit Financial Advisors
Location: Ballroom A/B

9:20 - 9:45 AM | Growth Playbook

John Cote, Chief Growth Officer, Merit Financial Advisors
Samantha Allen, Executive Vice President of Marketing, Merit Financial Advisors
Location: Ballroom A/B

9:45 - 10:30 AM | Activating the Three Pillars of Growth

Travis Brewer, Vice President, Senior Business Consultant, Fidelity
Location: Ballroom A/B

10:30 - 10:45 AM | Networking Break

10:45 - 11:15 AM | Loyal Client Advocates

Moderator: Kay Lynn Mayhue, President, Merit Financial Advisors

Panelists:

- Emily Boothroyd, Wealth Manager, Merit Financial Advisors
- Zach Mersberger, Managing Principal, Merit Financial Advisors
- Preston Byers, Wealth Manager, Merit Financial Advisors

Location: Ballroom A/B

AGENDA

WEDNESDAY, APRIL 16, 2025

11:15 AM - 12:00 PM | Breakouts

- **Unlocking Opportunities in Concentrated and Low-Cost Basis Stock - BlackRock**
 - Andy Hicks, Director, Options Strategist
 - Location: Ballroom A/B
- **Differentiating Your Value Proposition - Wealth.com**
 - Cyndie Smith, Vice President of Partner Success
 - Andy Miller, Senior Client Success Manager
 - Location: Matthews Room
- **Leading Through Influence - Wisdom Tree**
 - Carl Petty, Head of Leadership and Talent Development
 - Location: Niekro Room
- **Merit Impact Portfolios and Core + - bfinance**
 - David Ness, Head of U.S. Investment Consulting
 - Toby Goodwirth, Head of Liquid Markets
 - Location: Hank Aaron Boardroom

12:00 - 1:00 PM | Group Lunch

Location: Ballroom A/B

1:00 - 1:45 PM | Keynote Session

Sam Donaldson, Interim Associate Dean of Academic Affairs and Professor of Law

Location: Ballroom A/B

1:45 - 2:15 PM | Client Experience Fireside Chat

Moderator: Kate Redden, Director of Client Experience, Wealth Manager, Merit Financial Advisors

Panelists:

- Tim White, Co-Founder, Chief Growth Officer, Wealth.com
- Christine Simone, CEO and Founder, Move Health
- Roxane Harris, Vice President, Block Advisors

Location: Ballroom A/B

WiFi: Omni Meeting
Password: Enrich2025

REGISTRATION AND HELP DESK:

- Tuesday, April 15: 1 PM - 6 PM
- Wednesday, April 16: 8 AM - 4 PM
- Thursday, April 17: 8 AM - 12 PM

PARTNER EXPERIENCE VILLAGE:

Location: Ballroom C

- Wednesday, April 16: 9 AM - 4 PM

POWERED BY



WEDNESDAY, APRIL 16, 2025

2:15 - 3:00 PM | Breakouts

- **Streamline Your Annuity and Life Business - FIG**
 - Keith Burger, EVP, Head of Institutional Channel, Financial Independence Group
 - Location: Matthews Room
- **The Soul of Wealth, What History Teaches Us About Money and Meaning - Orion**
 - Dr. Daniel Crosby
 - Location: Ballroom A/B
- **Bridging the Gap in Alternatives - First Trust**
 - Rob Biddinger, Managing Director, Capital Solutions Group
 - Location: Niekro Room

3:00 - 4:30 PM | Networking Break

Location: Ballroom C

4:30 - 5:00 PM | Team Photo

All Merit Employees

5:30 - 9:30 PM | Group Dinner and Event

Location: Punch Bowl Social

THURSDAY, APRIL 17, 2025

8:00 - 8:30 AM | Breakfast

Location: Ballroom A/B

8:30 - 9:00 AM | Team Exercise

Kelly Gallimore, Wealth Manager, Chief Culture Officer, Merit Financial Advisors

Location: Ballroom A/B

9:00 - 9:10 AM | Compliance Corner

John Cote, Chief Growth Officer, Merit Financial Advisors

Doug Baxley, Chief Compliance Officer, Merit Financial Advisors

Location: Ballroom A/B

9:10 - 9:45 AM | Blurring Lines: Investments + Financial Planning

Brian Andrew, Chief Investment Officer, Merit Financial Advisors

Joe Cilley, Vice President of Financial Planning, Wealth Manager, Merit Financial Advisors

Location: Ballroom A/B

THURSDAY, APRIL 17, 2025

9:50 - 10:30 AM | Circle of Excellence Panel

Moderators:

- John Cote, Chief Growth Officer, Merit Financial Advisors
- Joe Cilley, Vice President of Financial Planning, Wealth Manager, Merit Financial Advisors

Panelists:

- Scott Meyer, Wealth Manager, Merit Financial Advisors
- Baylee Bryant, Wealth Manager, Merit Financial Advisors
- Marcus Anderson, Wealth Manager, Merit Financial Advisors

Location: Ballroom A/B

10:35 - 11:15 AM | Leadership Lightning Round

Speakers:

- Brian Green, Executive Vice President, Managing Operating Principal, Merit Financial Advisors
- Chrissy Lee, Chief Operating Officer, Merit Financial Advisors
- Alex Barthold, Regional Vice President, Director of Referral Programs, Merit Financial Advisors
- David Wahlen, Vice President of Strategic Partnerships, Merit Financial Advisors

Location: Ballroom A/B

11:20 - 11:30 AM | Closing Remarks

Rick Kent, CEO and Founder, Merit Financial Advisors

Kay Lynn Mayhue, President, Merit Financial Advisors

Location: Ballroom A/B

11:30 AM - 12:00 PM | Lunch

Location: Ballroom A/B

12:30 PM | Shuttle Service to Airport Begins