

EDGE Summits

Explore five summits at Wealth Management EDGE, the leading conference for advisor growth, with deep dives into UHNW, WealthTech, AI, Private Markets, and Investing.

Register for EDGE Summits →

View the full Summits agenda →



AI Assembly Summit

AI is no longer a side tool. It is becoming infrastructure.

The AI Assembly Summit is built for RIAs ready to move beyond experimentation and into implementation. This track focuses on how forward-thinking firms are deploying AI not just to create content, but to drive action, efficiency and measurable growth. This isn't theory. It's a blueprint for building the AI-enabled firm of the future.

Leave with a practical framework for implementing AI in ways that strengthen your operating model, accelerate growth and create a long-term competitive edge.

The AI Assembly Summit is ideal for CTOs, COOs, CIO, digital transformation leads, innovation teams and growth-minded advisors scaling RIAs.



Derrick Kinney
Founder
Success For Advisors



Joshua Wilson
Founder
NeuBeFi



John Wernz
Entrepreneur In Residence
Great Hill Partners



Matt Matrisian
President
Signature Estate & Investment Advisors

Explore the full AI Assembly Summit →

Private Markets Investing Summit

Hear direct from RIA firms how they have implemented new operating models, tech and fund structures to enable private market investing for their clients.

Not just the same old asset class updates, this Summit is education focused - specifically designed for all CIOs, wealth management executives and advisors looking for actionable best practices on private market investing.



Patrick McGowan
Managing Director, Head of Manager Research and Alternative Investments
Sanctuary Wealth



Chelsea Ganey
Chief Investment Officer
Summit Wealth Group



Jason Ray
President & Chief Investment Officer
Zenith Wealth Partners



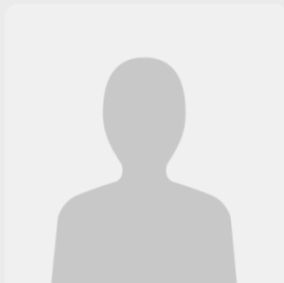
Benjamin Sayer, CFA
MD, Alternative Investments Group Head
MAI Capital Management

Explore the full Private Markets Summit →

Strategic Investing Summit

The Strategic Investing Summit brings together CIOs and wealth-management leaders to dissect the key forces reshaping modern portfolios in 2026 — from commodity cycles and international allocation shifts, to the rise of digital assets and tax efficient investments.

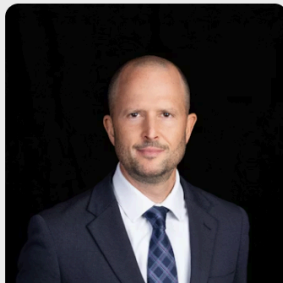
Join CIOs and investment leaders to ensure your clients portfolios are not missing any strategic investment areas that are often overlooked.




Matt Gotlin
Chief Investment Officer
Choreo Advisors



Bob Hostetter
Chief Investment Officer
VestGen Wealth Partners



Nate Geraci
Host of ETF Prime and Crypto Prime, President,
NovaDius Wealth Management



Eric Sterner
Chief Investment Officer
Apollon Wealth

[Explore the full Strategic Investing Summit →](#)


Tech for Growth Summit

Growth is no longer just about assets. It's about systems.

The Tech for Growth Summit is designed for RIAs focused on turning technology into a true growth engine. This track explores how leading firms are using data, automation, cybersecurity, tax strategies, and client experience technology to drive revenue, strengthen trust and make better executive decisions.

Walk away with a clearer roadmap for building a firm that scales efficiently, deepens client relationships, and competes at the highest level.

The Tech for Growth Summit is ideal for CEOs, Managing Partners, CIOs, CTOs, Heads of Growth, advisors, and senior leaders responsible for scaling enterprise and fast-growing RIAs.



Jason Pereira, CFP
Senior Partner and Financial Planner
Woodgate Financial



Michael Kitces
Chief Financial Planning Nerd
Kitces.com

[Explore the full Tech for Growth Summit →](#)

UHNW Summit

The UHNW Forum is designed for family offices and RIAs ready to move beyond traditional approaches and embrace innovative strategies for managing and preserving ultra-high-net-worth (UHNW) family wealth. This track focuses on how forward-thinking firms are addressing generational transitions, optimizing direct investments, expanding service offerings, and leveraging technology to create lasting legacies. This isn't just theory—it's a roadmap for building the next generation of family wealth management.

Leave with actionable strategies and frameworks to empower future family leaders, enhance investment opportunities, optimize estate planning, and leverage technology to strengthen your operating model and create a long-term competitive edge.

The UHNW Summit is ideal for family office executives, RIAs serving UHNW clients, estate planning specialists, wealth strategists, and advisors focused on legacy planning and intergenerational wealth transfer.

[Explore the full UHNW Summit →](#)