



ASCENT 2026 AGENDA

Growth Driven Leaders

A tailored agenda to help you maximize
your conference experience, designed with
your unique role and goals in mind.

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Tech Elite Welcome

Kick off Ascent with an exclusive opportunity to hear directly from Orion's visionary leaders at the Technology Elite Welcome session. Join Natalie Wolfson, CEO of Orion Advisor Solutions, and Reed Colley, President of Orion Advisor Technology, for an energizing discussion designed specifically for Orion's most forward-thinking technology partners and clients.

Natalie and Reed will share their perspectives on the future of advisor technology, Orion's commitment to innovation, and how a connected ecosystem can drive new levels of efficiency, customization, and client success. Get an inside look at Orion's technology roadmap, learn about the priorities shaping our next phase of growth, and discover how you can leverage the full potential of Orion's open architecture.

This is a rare chance to ask questions, network with industry peers, and connect directly with Orion's leadership. Start your Ascent experience inspired, informed, and ready to lead in a rapidly evolving wealthtech landscape.

Growth is Life: Strategies for Creating Your Firm's Secret Sauce

The fastest growing firms aren't achieving these results by accident. Hear from firms that are achieving accelerated growth, regardless of size. Get a look under the hood on how they chose their strategy, keys to implementation, and challenges they faced along the way. Hear how the plan changes at different horizons of growth.

Signals and Systems: Building the Infrastructure for Predictive Growth

Your firm is sitting on a mountain of data — but is it working for you? Learn how to move from fragmented spreadsheets and disconnected systems to an integrated data strategy that powers personalization, fuels insights, and drives growth. The future of advice is proactive, not reactive. This session explores how firms layer data science and AI on top of operational systems to identify growth signals, anticipate client needs, and make smarter decisions.

Signed. Sealed. Disrupted: Navigating Liquidity Event

M&A activity continues at a steady pace, but the dynamics are far from predictable. Shifts in interest rates, changing private equity timelines, and mass advisor transitions are redefining what a "successful" deal looks like. This panel will examine how real liquidity events went from advisors who've lived it. The discussion will also explore how firms can evaluate their own M&A readiness, assess risk in today's market, and avoid common blind spots that slow or derail transactions. This is a discussion you won't want to miss.

Writing Your AI Governance Policy: What Every Firm Needs to Know

As AI adoption accelerates, so does the need for clear policies. This session will help you build an AI governance framework that aligns with your values, protects your firm, and enables innovation.

Capital Partners or Culture Killers: Navigating Private Equity in Wealth

As advisory firms scale, many find themselves at a crossroads: bring in outside investment or continue to grow organically? Whether it's a private equity firm, minority investor, strategic acquirer, or even a bank or aggregator—capital can unlock new opportunities, but not without trade-offs.

In this dynamic panel, Orion Chairman Charles Goldman facilitates an open conversation with leaders from investment banks, capital partners, and advisory firms who've walked this path. Together, they'll unpack:

- The why now behind seeking investment and how to vet potential partners
- Deal structures that preserve culture, values, and advisor autonomy
- Red flags and questions to ask before signing a term sheet
- Real-life stories of successful (and painful) transitions
- What founders wish they knew before giving up equity

Whether you're eyeing growth capital, preparing for a succession event, or exploring your firm's long-term strategy, this session will provide honest perspectives and actionable insights to help you make the right next move.



Ascent 2026 is your chance to sharpen your skills, stay ahead of key industry shifts, and connect and learn from your peers. Don't miss this opportunity to expand your knowledge and spur growth for your business.