

AGENDA

ADISA

ALTERNATIVE & DIRECT INVESTMENT SECURITIES ASSOCIATION

MONDAY, OCTOBER 5

8:30 – 9:30 AM

Wealth in Wellness

10:45 – 11:30 AM

New Attendee Coffee Meet-Up

12:15 – 1:30 PM

Women's & Next Generation Lunch:
The Great Wealth Transfer to Women

1:45 – 2:45 PM

Roundtables with Sponsors,
Broker-Dealers, RIAs & Independents

3:00 – 3:40 PM

**General Session: Welcome, ADISA
Updates & Awards**

3:40 – 4:20 PM

**General Session: Alternative
Investment Industry Update**

4:20 – 5:15 PM

**General Session: Private Markets
Update — Real Estate, Private
Credit & Oil & Gas**

5:15 – 6:45 PM

Opening Cocktail Reception

7:30 – 10:00 PM

Next Gen Reception

TUESDAY, OCTOBER 6

8:00 – 9:00 AM

Breakfast & Exhibits

9:05 – 9:50 AM

**General Session: Legislative &
Regulatory Update**

10:00 – 11:00 AM

ADISA Tech Fair
Alts 101: Battle of the Experts

11:00 – 11:20 AM

Networking Break

11:25 AM – 12:10 PM

BREAKOUTS:
Ask the Attorneys
Oil & Gas 101: Assets, Program
Strategies & Tax Features
Mentorship Runs Both Ways: Building
Relationships That Compound
The Wrapper Revolution: PPLI &
PPVAs in the Alts Distribution Stack

12:15 – 1:30 PM

Lunch & Exhibits

1:30 – 2:15 PM

BREAKOUTS:
DST 101: The Building Blocks of a
1031 Exchange Practice
Red Flags & Green Lights: Inside Due
Diligence
Model Behavior: Interval Funds &
Liquidity Design in Portfolio Models
Shaping the Narrative: What the
Media is Covering in Alts

2:20 – 3:00 PM

Networking Break & Tech Fair

3:05 – 3:50 PM

BREAKOUTS:
Stacking the Deck in Your Favor: E&O,
Due Diligence & Suitability
An Unfiltered Top Producer Playbook
Both Sides of the Custody Rule: RIAs
& Custodians
From Pilot to Production: Putting AI
to Work Inside Your Firm

3:55 – 4:40 PM

BREAKOUTS:
The AI-Enabled Advisor: Automation,
Governance & Accountability
Tax-Advantaged Alternatives:
Opportunities & Execution
QOZ 2.0: Overrated or Underrated
Oil & Gas 201: Evaluating Risk &
Return in Non-Traded Programs

4:45 – 5:30 PM

**General Session: The Alternative
Advantage — How Broker-Dealers
Are Driving Growth**

5:30 – 6:45 PM

Cocktail Reception & Exhibits

WEDNESDAY, OCTOBER 7

8:00 – 9:00 AM

Breakfast & Exhibits

9:05 – 9:50 AM

BREAKOUTS:
Real Estate Under Review: How DDOs
Assess Today's Market
Alts in the Compliance Manual:
Disclosures, Policies & Procedures
Anatomy of a DST Review
Function or Feature: Product
Formation & Paths to Liquidity

10:00 – 10:50 AM

KEYNOTE SPEAKER:
**A Conversation with Steve
Wozniak***Sponsored by Skyway Capital Markets*

11:00 – 11:30 AM

Committee Working Sessions