



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

11:30 AM: Arrival & Registration

12:00 PM: Welcome & Opening Remarks

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

Tony Brock, Executive Director of the 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: Networking Break

03:00 PM: Tech Fusion : Wealth and Beyond

Elena Caroll, Executive Ambassador, TFA

Michelle Garrett, 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

Day 1

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

Pamela Cytron, President, The Founder 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 Host of Business Decoded

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

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 Chicken N Pickle. Further details to come in event communications.

October 9

Day 2

Location: Center for Visual and Performing Arts | 900 E Sanford St,
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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: Founders Unplugged: Candid Conversations with the WealthTech Accelerator Cohorts

10:15AM: Commercial Networking Break

10:30AM: 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

11:15 AM: Champion Circle: Leading WealthTech and Adjacent Industries

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

Location: Center for Visual and Performing Arts | 900 E Sanford St,
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12:00 PM: Lunch

01:00 PM: WealthTech Speed Networking

**01:45 PM: Launchpad Leaders: Navigating
the Startup Acceleration Landscape**

Hamza Qadir, Managing Director, The Founders Arena

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

2:30 PM: Commerical Networking Break

3:00 PM: AI at Work: Partners in Progress

MJ Petroni, CEO, Cyborg Anthropologist, and Futurist,
Causeit, Inc.

**3:45 PM: The Open Playbook: Q&A with the
Audience**

4:15 PM: Closing Remarks.