

Pre-Meeting Sessions

Tuesday, May 12

8:00 am Check-in table open in Trinity foyer from 8 am to 5 pm.

	Nautilus Plus Members in San Jacinto	
12:00 pm	Lunch for Nautilus Plus Members only/Nautilus team 12 – 1 pm	
1:00 pm	Idea Sharing for Nautilus Plus Members only 1 – 5 pm	
5:00 pm	Break	Nautilus Board Members
5:30 pm	Reception for Nautilus Plus Members in Suite 221	Reception for Nautilus Board Members in Suite 221
6:30 pm	Nautilus Plus Members only dinner Hosted by Matt Pate	Nautilus Board Members dinner Hosted by Kathryn Rodgers

Wednesday morning, May 13

7:00 am Check-in table open in Trinity foyer from 7 am to 5 pm.

7:30 – 8:30 am Breakfast in Trinity I

	Nautilus Plus Members Only in San Jacinto <i>on Level I</i>	Nautilus Coaching Series in Sabine <i>on Level II</i>	Practice Management in Willow Creek <i>on Level II</i>	Nautilus Board Members in Canyon Lake <i>on Level II</i>	Nautilus Case Development in San Antonio <i>on Level II</i>
7:30 am	Nautilus Plus Members only breakfast				
8:00 am				Nautilus Board meeting	
8:30 am	Idea Sharing for Nautilus Plus Members only Hosted by Matt Pate	Coaching Series <i>By invitation only</i> Allen Hensley			
9:00 am			Practice Management Elevate Your Practice: Advisor-Associate workshop		Open office hours – Meet with the Nautilus case development team and Jim Friendly (Compliance)
9:30 am					
11:30 am					
12:00 pm	New Member Lunch with Nautilus board, Next Gen committee, and Nautilus leadership team <i>By invitation only. Grab your lunch from the buffet and meet in Pecos.</i>				

Lunch in Trinity I for all attendees.

2026 Nautilus Annual Meeting

Wednesday afternoon, May 13

MC: Lizzie Dipp Metzger

Main platform presentations in Trinity Ballroom

1:00 pm	Nautilus: Expectations and Evolution Kathryn Rodgers VP, Head of The Nautilus Group
1:15 pm	Unlock Your Brilliance Own the Moment. Create the Moment. Seize the Moment. Simon T. Bailey
2:15 – 2:45 pm	Inside the Vision: A Conversation with Nautilus Leadership Kathryn Rodgers, Rob Shapard, Matt Pate, and Sarah Frances Trampe
2:45 pm	Break

Main platform presentations in Trinity Ballroom

Associates' Track in Willow Creek on Level II

3:00 pm	From the Conventional to the Sensational: Blowing the Doors Off Your Best Estate Plan Alan S. Gassman, JD	Associates Panel Kathleen Bailey (Todd Purich), Pablo Magdaleno Carlos, (Lizzie Dipp Metzger) and Matthew Leahey (Isaiah Edison) Hosted by Jasmine Johnson
4:00 pm	Less Is the New More: How a Reductive Mindset Unlocks Clarity, Capacity, and Command Juliet Funt	
5:00 pm	Break	
5:45 – 6:30 pm		Associates' Happy Hour In the Sabine foyer (<i>on Level II</i>)
6 – 9 pm	Nautilus Night In Reception in Trinity foyer begins at 6 pm. Dinner in Trinity I begins at 6:30 pm.	

Enjoy the following while you mix and mingle with your peers:



Create a personal trading card as an event keepsake at the photo booth.



Find the roaming photographer and see what the AI will make of you!



Compete in the closest to the pin golf tournament to find out who's the best in the group.



Show off your musical talents with a karaoke performance – back by popular demand!

2026 Nautilus Annual Meeting

Thursday, May 14

MC: Michael Broderick

7:00 am Check-in table open in Trinity foyer from 7 am to 5 pm.

7:30 am Breakfast in Trinity I for all attendees.

Main platform presentations in Trinity Ballroom

8:30 am **Home Office Leadership Conversation**
Amanda Kuhl, SVP, Field Experience Value Stream and
Sonali Virendra, SVP, Head of Agency

9:30 am **Using Behavioral Economics to Think Holistically about Protection and Growth**
Dr. Shlomo Benartzi, Nautilus Plus Member Taylor Sledge and
Sean Madgett, VP, Field Experience Value Stream

10:15 am Break

10:35 am **Five-Minute Face Off: Nautilus Members Share What Works**
Select Nautilus Members (pictured below) go head to head with their best sales ideas
Moderated by Gib Surles

12 – 1:00 pm Lunch in Trinity I for all attendees.

Associates' Lunch - Grab your meal from the buffet and meet in the Pecos room on Level I.

NYLARC Lunch in Copper Creek restaurant (located in Marriott lobby near hotel entrance).



NIC BAKER



ISAIAH EDISON



PAUL HAYE



VINNIE IÑIGUEZ



MARK KISSINGER



SEAN McCANN



JOHN NEBEKER



ANJA NICKEL



STEVE TAUB



WES YOUNG

Five-Minute Face Off

2026 Nautilus Annual Meeting

Thursday afternoon breakout workshops

	San Jacinto on Level I	Trinity Ballroom on Level I	Willow Creek on Level II	Sabine on Level II
1:00 pm	Elevating Your Digital Presence: A Strategic Social Media Approach Charisse Lewis, Nautilus Plus Member Nazih Yehya and Leah Greenland	Unleashing AI & ChatGPT to Maximize Productivity and Supercharge Results Ford Saeks <i>(repeats at 2 pm)</i>	Incorporating Estate Planning into Retirement Planning Steve Parrish, JD, RICP®, ChFC®, CLU®, RHU®, AEP®	Zocks training for Associates – Session 1: Mastering Operations from Setup to Execution Rachel Long and Annie Ganousis
2:00 pm	Break			
2:15 pm	Executing Your Marketing Plan with Nautilus Concierge Support Darla Bean, Jamie Moore, and Nautilus Member Tom Sunny	<i>Repeat session</i> Unleashing AI & ChatGPT to Maximize Productivity and Supercharge Results Ford Saeks	Mistakes in Retirement Distribution planning – and how to avoid them Steve Parrish, JD, RICP®, ChFC®, CLU®, RHU®, AEP®	Zocks training for agents – Session 2: Driving Growth – Scaling Your book with Zocks Rachel Long and Annie Ganousis
3:15 pm	Break			
3:30 pm	Bringing VUL to Life: New Product, New Sales Story, New Opportunity Allen Hensley	Leadership & Management Training to Increase Team Performance & Culture Ford Saeks	From Tax Return to Strategy-Integrating Holistiplan Sal Arcadipane, Geoff Turvey, and Nautilus Member Mark Wiskus	Zocks 201 training – Session 3: Advancing Your Strategy Through Customizations Rachel Long and Annie Ganousis
4:30 pm	Break			
5:30 pm	Reception in Trinity foyer			
6:30 pm	Nautilus Night Out Gather in the Trinity lobby area near the Nautilus staff members holding the signs with the name of your selected restaurant. Groups will depart for the restaurants at 6:30 pm.			

If your lanyard is white, you are going to Truluck's.



If your lanyard is blue, you are going to Bob's.



2026 Nautilus Annual Meeting

Friday, May 15

MC: Kirk Quaschnick

7 - 11:30 am Check-in table open in Trinity foyer.

7:30 – 8:30 am **NYLARC interest breakfast** - *An informal opportunity to learn about joining NYLARC. Grab your breakfast from the buffet and meet in the Pecos room on Level I.*

7:30 – 8:45 am Breakfast in Trinity I

7:30 am -
12:20 pm Luggage storage in San Jacinto.

- All bags must be claimed by **12:20 pm**. (Buses leave promptly at 12:30 pm.)

Main platform presentations in Trinity Ballroom

9:00 am **From the Trenches, not the Textbook:
Lessons from Coaching NYL's Top Producers**
Jay Bowden

9:45 am **UnLeadership:
Everything Has Changed and Nothing is Different**
Scott Stratten

10:45 am Break

11:05 am **Raise Your Game:
How to Maximize Your Performance, Productivity, and Results**
Alan Stein, Jr.

11:50 am **Closing remarks**
Kathryn Rodgers

12:00 pm Grab-n-go lunches will be available in Trinity foyer.

12:30 pm Buses depart for Love Field and DFW airports.

Thank you for attending our meeting.

We look forward to working with you and your team throughout the coming year!



Download the survey and give us your feedback.



Mark your calendar for the 2027 Nautilus Annual Meeting dates. We'll see you back in Plano next year!