

# 2026 Personal Wealth Conference Agenda

Wednesday, April 15

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Evening Client Reception: Cocktails and Hors d'oeuvres 5:30 - 7:30 PM

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Thursday, April 16

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Registration and Light Breakfast 8:15 - 8:30 AM

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Opening Remarks 8:30 - 8:45 AM

**Robin Winningham**, *Chief Operating Officer, Scholar Financial Advising*

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Building a Multi-Generational Portfolio 8:45 - 9:45 AM

**Stephan Shipe, Ph.D., CFA, CFP®**, *Financial Advisor & CEO, Scholar Financial Advising*

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A New Signal for Market Valuations 9:45 - 10:45 AM

**Deon Strickland, Ph.D.**, *Financial Advisor and Economist, Scholar Financial Advising*

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Break 10:45 - 11:00 AM

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Estate Planning Today 11:00 AM - 12:00 PM

**J. Aaron Bennett, J.D.**, *Estate Attorney, Carruthers & Roth P.A.*

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Networking Lunch 12:00 - 1:00 PM

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Ask an Advisor Panel 1:00 - 1:45 PM

**Stephan Shipe, Ph.D., CFA, CFP®, Derek Cheshire, CFP®, EA, Deon Strickland, Ph.D.**

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Closing Remarks 1:45 - 2:00 PM

**Robin Winningham**, *Chief Operating Officer, Scholar Financial Advising*

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Optional Group Outings 2:00 - 5:00 PM

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Friday, April 17

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Breakfast & Opening Remarks 8:15 - 8:45 AM

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Spending with Intention 8:45 - 9:45 AM

**Derek Cheshire, CFP®, EA**, *Associate Financial Advisor, Scholar Financial Advising*

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The Evolution of Modern Markets 9:45 - 10:45 AM

**Marty Malloy**, *Professor of Finance, Wake Forest University School of Business*

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Break 10:45 - 11:00 AM

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Investing in Private Businesses in an Era of Mass Retirement 11:00 AM - 12:00 PM

**Brandon Mendez, Ph.D.**, *Clinical Assistant Professor of Corporate Finance and Investments, University of SC*

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Networking Lunch 12:00 - 1:00 PM

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Panel Discussion 1:00 - 1:30 PM

**Deon Strickland, Ph.D.**, *Financial Advisor, Scholar Financial Advising*

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On the Horizon: What We're Watching for Next Year 1:30 - 2:00 PM

**Stephan Shipe, Ph.D., CFA, CFP®**, *Financial Advisor & CEO, Scholar Financial Advising*

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