

Thu 12.

18:00 - 22:00

Welcome Reception and Dinner, Hoodoo Moab.

Welcome Reception followed by a group dinner at the conference venue. Glasshouse Room, Hoodoo Moab 111 N 100 W, Moab, UT 84532 Phone: +1 435-355-0595

Fri 13.

08:00 - 09:00

Breakfast and hellos at Hoodoo, Moab.

Breakfast will be available from 8:00 a.m.

09:00 - 09:15

Welcome, ground rules and introductions.

Welcome, ground rules and introductions. Jim Wiandt.

Jim Wiandt
Stack VC

09:15 - 09:30

Who's Who.

In 30 seconds - who you are, what you do, what you want from the gathering.

09:30 - 10:30

Setting the Table for 2025.

We'll set the tone for our two days together by discussing the big topics in the ETF and index industry globally this year and beyond. Each firestarter will take a couple minutes to frame what they see as the biggest challenge

Som Seif
Purpose Investments
Laura Morrison
Texas Stock Exchange

Ugo Egbunike
Jane Street

10:30 - 11:10

Private Assets in ETFs

Clearly there is a market. Is it a boon to investors or a disaster waiting to happen - talking through the challenges and the opportunities in private credit and equities markets.

Jon Fee
VettaFi
Tom Staudt
ARK Invest

Steve Cohen
ProShares

11:10 - 11:30

Morning coffee and networking break

Morning coffee and networking break

11:30 - 12:10

Innovation in ETFs

Hedged and defined outcome, single levered stocks, levered payouts, levered crypto. Billions of new dollars have flooded the market. Who are the investors and how are issuers reaching them?

Adam Phillips
VanEck
Kelsey Mowrey
Motley Fool Asset Management

Mike Venuto
Tidal Financial Group
Kevin Gopaul
REX Financial

12:10 - 12:50

Share Classes

Are we ready for the wave that is coming?

Sebastian Mercado
Bloomberg
Ugo Egbunike
Jane Street

Ben Fulton
WEBs Investments Inc.

12:50 - 14:00

Lunch

Hoodoo Hotel - Adjacent to meeting room.

14:00 - 14:45

Tokenization: Is it for real?

Many issuers and ecosystems players have initiatives focused on tokenization. What is the timeline for real change? Potential Firestarters: Duncan Moir, Scott Davis, Som Seif

Duncan Moir
2IShares
Scott Davis
Capital Group,

Som Seif
Purpose Investments

14:30 - 17:30

P.M. Discussion Sessions

Hoodoo Hotel.

14:45 - 15:00

10 Questions in 15 Minutes.

Ugo Egbunike chats with Alex Morris F/m Investments, a new attendee and one of the more creative minds in the ETF industry.

Ugo Egbunike
Jane Street

Alex Morris
F/m Investments

15:00 - 15:45

Afternoon Coffee Break and Networking

Afternoon Coffee Break and Networking

15:45 - 16:30

Global Trends

How does what is happening globally translate in the US and Vice Versa. Potential firestarters: Rahul sen Sharma, Gina Lee, Nik Bienkowski

Nik Bienkowski
HANetf
Gina Lee
Samsung Asset Management

Rahul Sen Sharma
Indxx

16:30 - 17:00

ETF Problem Solving

Finding solutions for platform fees and distribution, seeding, etc. Potential firestarters: Laura Brady, Alex Morris.

Laura Brady
Strive

Alex Morris
F/m Investments

17:00 - 19:45

Free Time

Relax at the pool, email catch-up, dinner prep and mingling.

19:30 - 22:30

Dinner at 98 Center Moab

98 Center - 98 E Center St, Moab, UT 84532 8 minute walk from Hoodoo.

Sat 14.

06:45 - 07:15

Breakfast On the Go.

We'll be picking up packed hot and cold Breakfast options at Hoodoo before we depart for activities.

07:20 - 07:25

Arches Hike Group: Pick Up at Hoodoo Outside Main Lobby

Pick Up 7:25 at Hoodoo Outside Main Lobby (return 12 noon)

07:30 - 12:30

Group Networking Activities.

To beat the heat we're heading out early for group networking activities into some of the most beautiful countryside the USA has to offer. Discussion session will follow after lunch.

08:10 - 08:15

Colorado River Rafting: Pick Up at Hoodoo Outside Main Lobby

Pick Up at 08:15 at Hoodoo Outside Main Lobby (return 12:15)

13:00 - 14:00

Lunch.

Networking Lunch at Hoodoo. Adjacent to meeting room.

14:00 - 14:10

Overview of Day 1

Quick overview of Day 1 and setup for the logistics of day 2.

14:10 - 15:00

The AI Revolution: Implications and Applications.

Everyone agrees that AI will transform asset management as it is transforming everything. Where is it starting and where will it go? Customized marketing, better portfolio solutions? What about compliance and IP? Use Cases.

Deborah Yang
Daizy
Peter McKillop
Climate & Capital Media

Linda Zhang
Purview Investments
Som Seif
Purpose Investments

15:00 - 15:45

Entrepreneurs Roundtable

Jeff Cruttenden, Doug Scott, Som Seif and Mike Venuto talk about innovation, culture building and commercial vision.

Jeff Cruttenden
Treasury
Mike Venuto
Tidal Financial Group

Doug Scott
Ethic

15:00 - 16:00

Grab Bag

Deep dive into whatever we want to explore in more detail...

15:45 - 16:00

The Texas Stock Exchange

What place is there for a new exchange - the value proposition for ETF issuers. Potential Firestarters: Laura Morrison with Blake Grossman

Laura Morrison
Texas Stock Exchange

Blake Grossman
ThirdStream Partners

16:00 - 17:00

Wrap-up.

Review of event and wrap up and discussion of 2026. Jim Wiandt and Ugo Egbunike.

Ugo Egbunike
Jane Street

Jim Wiandt
Stack VC

17:00 - 17:30

Wrap Up.

Wrap Up with Summary of Take Aways and Planning for 2026.

17:00 - 19:25

Free Time

Relax at the pool,, email catch-up, dinner prep and mingling.

19:00 - 22:30

Closing Dinner at Sorrel River Ranch

Shuttle buses will depart from the Hoodoo Hotel at 7:30 p..m.

19:30 - 22:30

Closing reception: Sorrel River Ranch - Bus departs at 19:30 from the Hoodoo - Main Lobby.

Closing reception: Sorrel River Ranch, Mile 17 UT-128, Moab, UT
84532 Transport from Hoodoo to Sorrel River Ranch Bus
departs at 19:30 from the Hoodoo - Main Lobby.
