THE CONSTANT EVOLUTION OF PROFESSIONAL ADVISING

Daylight

Thursday, February 12, 2026
10 am PT/ 1 pm ET
Registration required

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www.daylightadvisors.com

Wealthy individuals continue to expect more from their professional advisors. They want to discuss the underlying purpose of their assets, the assets' impact on their families' well-being, and their ability to use the assets to benefit others and achieve social impact. Effective advisors must learn to navigate the emotional, behavioral, and family dynamics aspects of wealth more confidently.

Join experienced family advisors as they discuss the continued evolution of advising wealthy families, clients' search for purpose, the questioning of wealth accumulation, and the role of modern philanthropic planning.

Noel Pacarro Brown
Financial Advisor, Conscious Wealth Management Group
Morgan Stanley

Tony Macklin
Director, Advisor Practice
Daylight

Crystal Thompkins
Director, Strategic Impact
Daylight

Register

Webinar recording will not be available.

Special offer!
All attendees are eligible to receive $250 off an IPA registration.