

DREAMMAKERS 2025

APRIL 4TH - APRIL 5TH

Conference Agenda

THURSDAY, APRIL 3RD

2:30PM - 5:30PM **Trilogy Leadership University Capstone Presentations* (Invite-only)**
Emerald Cove

FRIDAY, APRIL 4TH

8:00AM - 10:30AM **Headshots Available**
Sapphire Foyer

8:00AM - 8:30AM **Shareholders Breakfast* (Invite-only)**
Two Harbors

8:30AM - 10:30AM **Shareholders Meeting* (Invite-only)**
Two Harbors

11:00AM - 11:15AM **Opening**
Sapphire Ballroom

11:15AM - 12:00PM **The Power of Branding: A Conversation with Thom McElroy**
Sapphire Ballroom

12:00PM - 1:30PM **Lunch**
Ocean Lawn
Headshots Available

1:30PM - 2:15PM *Advisor Break-out*
Investment Insights: Market Commentary & Trilogy Capital Portfolios
Mike Serio, CIO
Sapphire Ballroom

Operations Break-out
Trilogy's Service Model 2.0
Dave Murray, VP of Consulting at The DiJulius Group
Two Harbors

2:15PM - 2:30PM **Break**

2:30PM - 3:15PM *Advisor Break-out*
How to Optimize Your Revenue
Coach Joe, Magellan Network Coach
Sapphire Ballroom

Operations Break-out
Trilogy's Service Model 2.0
Dave Murray, VP of Consulting at The DiJulius Group
Two Harbors

3:15PM - 3:30PM **Break**

3:30PM - 4:45PM **State of the Union**
Jeff Motske, CEO and President
Sapphire Ballroom

4:45PM - 5:00PM **Closing**
Sapphire Ballroom

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SATURDAY, APRIL 5TH

6:00PM - 12:00AM

Awards Celebration

Sapphire Ballroom & Ocean Lawn

CONFERENCE SPEAKERS



Thom McElroy

Retired, Co-Founder of Volcom

Trilogy Board Member



Dave Murray

VP of Consulting

The DiJulius Group



Coach Joe

Advisor Coach

Magellan Network



Jeff Motske, CFP®

President & CEO



Mike Serio

Chief Investment Officer