INCOME UNDER MANAGEMENT® SUMMIT

July 19-21, 2026 | Nashville, TN

Become the best in the industry, learning from and connecting with top financial experts while unlocking the future of finance.

#IUM2026

livecurrence.com

Welcome to IUM Summit 2026!

By being here, you've made a powerful investment in your future, your clients, and the impact you want to create through your work. We know that stepping away from the demands of your business isn't always easy, which is why we are committed to making these next few days as valuable and transformational as possible.

This year's theme, “Building the Perfect Financial Plan”, challenges the conventional view of financial planning. The perfect financial plan isn't a static document; it's a living roadmap that helps clients make better decisions, adapt to life's changes, and create lasting financial confidence. Over the next few days, we'll explore how advisors can build planning relationships that are dynamic, actionable, and centered around cash flow, behavior, and real-life outcomes.

But IUM is about much more than the sessions.

It's about the conversations between sessions. The ideas shared over coffee. The relationships formed in hallways and networking events. It's about being surrounded by a community of advisors who believe there is a better way to help people achieve financial freedom and who are committed to growing both personally and professionally.

Our goal is simple: we want you to leave Nashville with practical tools you can implement immediately, new relationships that will strengthen your journey, and a renewed vision for the work you do every day.

A special thank you to our sponsors, partners, speakers, and the incredible team whose dedication and hard work have made this event possible. Your support allows us to bring together a community that is committed to transforming the future of financial planning.

Most importantly, thank you for being here. Thank you for believing in the mission. Thank you for investing in yourself and the families you serve.

Sincerely,

Dave Mozeika
Founder & CEO, Currence

INCOME UNDER MANAGEMENT® SUMMIT

Agenda

Sunday, July 19th

5:00pm Welcome Reception

Brought to you by Madan+

Monday, July 20th

8:00am Networking Breakfast

Brought to you by OneDegree Coaching

9:00am The Perfect Financial Plan

David Mozeika

Challenge the traditional view of the financial plan as a static document and explore why the most effective plans are designed to evolve through continuous decision-making.

10:15am Future Proof the Advisor

Paul Melella

In this high-impact session, Coach Paul Melella Jr. – Grand Master, performance coach, and co-author of The Freedom Equation – challenges advisors to stop competing on information and start leading with identity.

11:15am Break

11:30am The Currence Way

David Mozeika

This session introduces the Currence Curriculum, the proprietary educational arc that transforms the way clients think about their money before a single recommendation is ever made.

12:00pm First Principles: The Economic Foundation of the Currence Process

Vince D'Addona

This session establishes the immutable economic truths that every recommendation, every conversation, and every client outcome is built upon.

12:30pm Lunch

Brought to you by SPG Life & Annuity

2:00pm Customers to Clients

Mando Sallavanti

In this session you will learn how Mando has created a high-touch, high-value service that prioritizes client retention while still growing 75% year over year for three years in a row.

2:45pm Setting the Default to Success

Brock Fortner

This session teaches advisors a structured cash flow exercise that begins with where a client's money currently flows and ends with the client making a fully owned decision to change it and choosing you as their Strategist.

3:45pm Break

4:00pm The Right Amount. The Right Type.

David Mozeika

This session introduces two powerful client-facing exercises designed to guide every client through the two essential life insurance decisions with clarity, conviction, and complete ownership of the outcome.

4:30pm Mortality Arbitrage for Retirement Income

Jason Goldstein

Using the two Economic Power Approach for retirement income planning.

INCOME UNDER MANAGEMENT® SUMMIT

Agenda

5:00pm The Authority Advantage

Sean Platt & Caleb DeLon

Unpack the three ways advisors build authority that walks into the room ahead of them, so the first meeting starts on trust instead of skepticism.

Tuesday, July 21st

8:00am Networking Breakfast

9:15am Using Currence as the Meaningful Differentiator

Bill Cates

In this highly interactive, hands-on session, you will discover how to communicate your use of Currence as a magnet to gain more ideal clients, employ The Differentiation Gap Formula that will grab your prospects' attention, and use transformational experiences to create advocates who introduce you to others

10:15am The Currence Roadmap

Aashay Shah

Pull back the curtain on what is being built, what is coming next, and what it means for every financial professional in this room.

10:45am Break

11:15am Discovering My Investment Philosophy

Daniel Salazar

This session trains advisors on how to facilitate a structured, purposeful meeting designed to help every client discover — and articulate — the investment philosophy that already lives within them.

12:15pm Lunch

Brought to you by Matson Money

1:15pm The Calibration Session

Kristin Niedermeyer

Discover exactly how to run a Calibration Session from opening to close: the agenda, the language, the worksheets, and the mindset that makes this meeting one of the most valued experiences a client has in their financial life.

2:30pm The Other Side of Page 3

Vince D'Addona

Take a deep dive into Page 3 of the Enrollment Workbook and the importance of helping clients build and optimize their cash flow engines.

3:30pm Break

4:00pm The Power of Client Segmentation

Jason Goldstein

Learn how to use the GoldFisch Method for effective client segmentation. It is not a gut feeling dressed up as a ranking system. It is a deliberate, multi-variable assessment that evaluates every client relationship against a consistent set of criteria — producing a clear, defensible, and actionable picture of where each client sits in the practice and what level of time and attention that position warrants.

We Want to Hear from You!

Visit the Currence booth to share your experience and record your testimonials!

Your feedback is invaluable to us, and we can't wait to capture your thoughts. Stop by, and let's celebrate your journey together!

We will be providing you with your recorded testimonial to use for your own social media platforms to share with colleagues, clients, and your network!

Don't forget to post throughout the conference and use **#IUM2026.**

The Perfect Financial Plan

David Mozeika

Notes

3 Key Takeaways

1.

2.

3.

Action Item

Future Proof the Advisor

Paul Melella

Notes

3 Key Takeaways

1. Identity beats tactics. Every time.

Most advisors are trying to grow their business by changing what they do. The real leverage is in changing who they are. Attendees will learn why their business can't outgrow their identity – and the specific framework for closing that gap.

2. Your Worthy Ideal is the only business strategy that can't be replicated by AI.

A mission-driven advisor who protects families with conviction, clarity, and purpose will always outperform an advisor chasing production numbers. Attendees will define their Worthy Ideal – the mission-level statement that becomes their Mental GPS for every decision they make.

3. Standards are not aspirational. They're non-negotiable.

The 1 Degree Advisor Code of Honor isn't a motivational checklist. It's the ten standards that define who you are when pressure hits, when money is on the line, and when no one is watching. Attendees will identify the one standard they've been compromising – and commit to the specific behavior that changes starting the next morning.

Action Item

Within 24 hours of leaving the session, complete one exercise:

Write one sentence that answers this: "My mission as an advisor is..." – not a production goal, not a revenue target, but the reason this work matters when no one is clapping.

Then identify the single standard from the 1° Advisor Code of Honor that, if lived fully starting tomorrow, would change the trajectory of your practice within 90 days.

Write it down.
Sign it.
Send it to one person who will hold you to it.

That's the 1° difference.

Not a giant leap.
One standard.
One decision.
One degree better today than you were yesterday.

The Currence Way

David Mozeika

Notes

3 Key Takeaways	Action Item
1.	
2.	
3.	

First Principles

Vince D’Addona

Notes

3 Key Takeaways

1.

2.

3.

Action Item

Customers to Clients

Mando Sallavanti

Notes

3 Key Takeaways

1. How to find clients through LinkedIn

2. How to close prospects

3. How to turn a prospect into a long-term client

Action Item

Use the 3-commitment close in a prospect meeting next week.

Setting the Default to Success

Brock Fortner

Money Movements

Inflows

Any form of new money entering your world. Inflows can be from earned sources, passive sources, or from unscheduled sources.

Outflows

Any form of money permanently leaving your world. Outflows are considered funds needed for fixed, variable, and discretionary expenses.

Capital Flows

Any form of money staying within your world. Capital Flows are movements between your assets, for instance moving money from your savings account to an investment account.

PENSIONS BONUS
SALARY BUSINESS
ROYALTIES
INVESTMENTS
TRUSTS INTEREST
DIVIDENDS

MORTGAGE
FIXED EXPENSES
VARIABLE RENT
DISCRETIONARY
VACATION
EXPENSES

◆ Inventory of Income Sources

Your Name:

1. ______________________
Source Frequency Amount

2. ______________________

3. ______________________

4. ______________________

5. ______________________

6. ______________________

Par tner/Spouse:

1. ______________________

2. ______________________

3. ______________________

4. ______________________

5. ______________________

6. ______________________

Total: ____________

■ Inventory of Spending Accounts

Your Name:

1. ______________________
Account Average Monthly Spending

2. ______________________

3. ______________________

4. ______________________

5. ______________________

6. ______________________

Par tner/Spouse:

1. ______________________

2. ______________________

3. ______________________

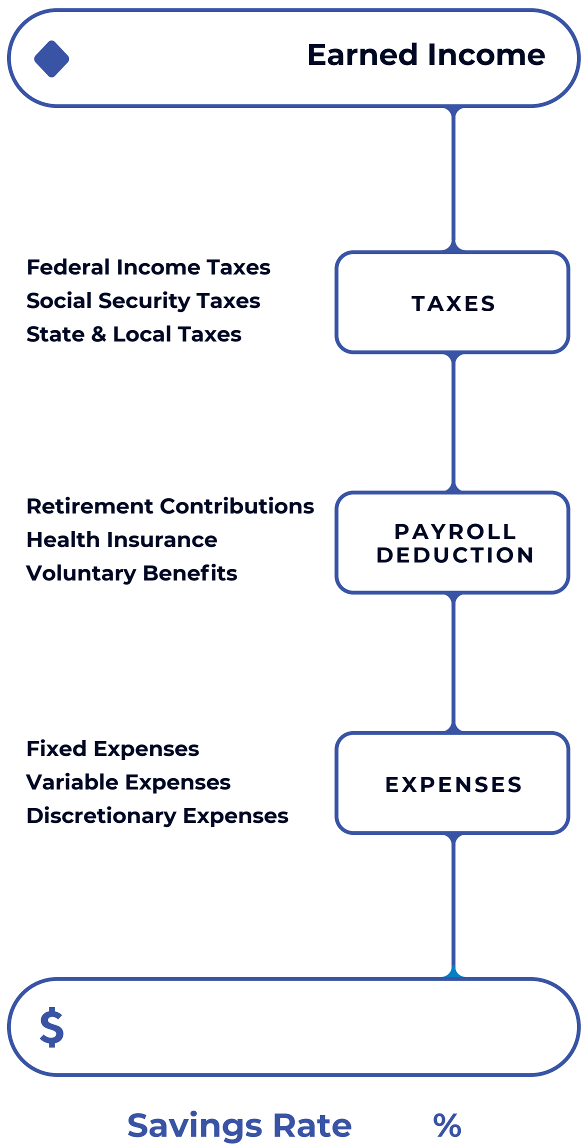
4. ______________________

5. ______________________

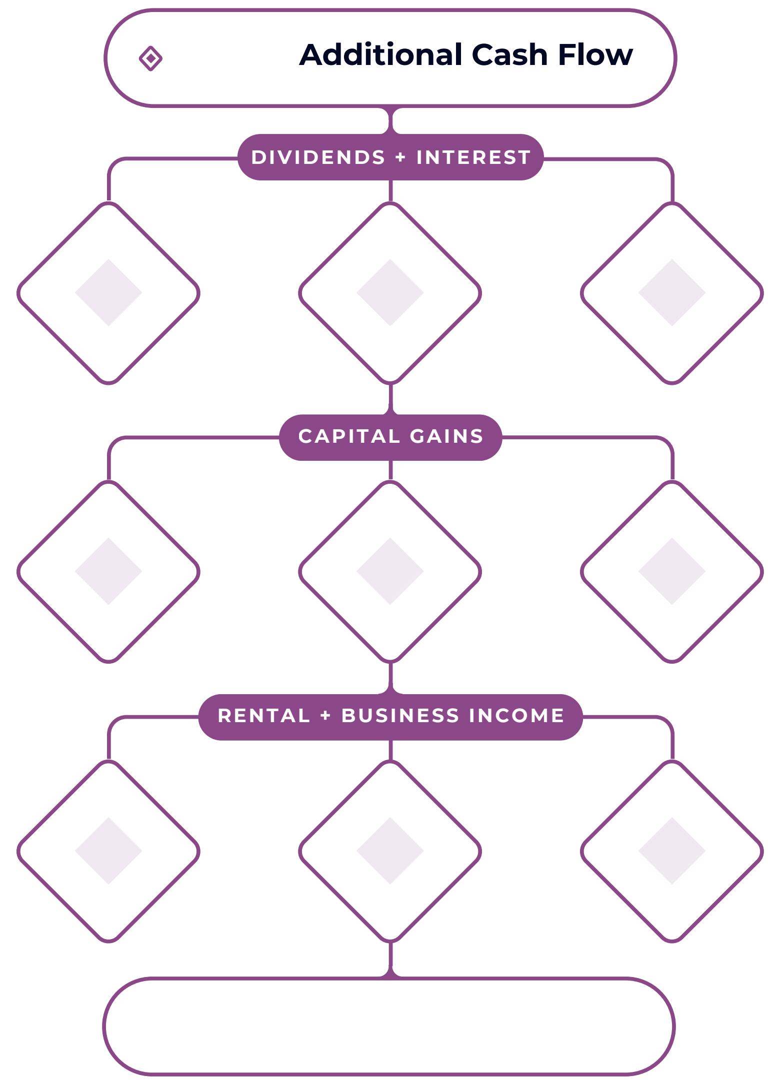
6. ______________________

Total: ____________

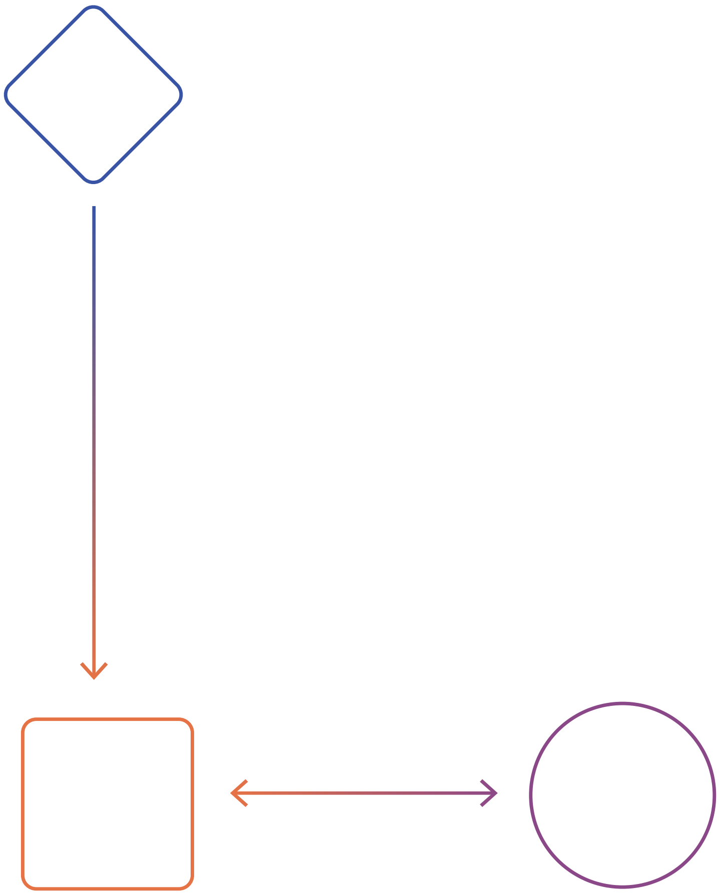
Financial Gravity



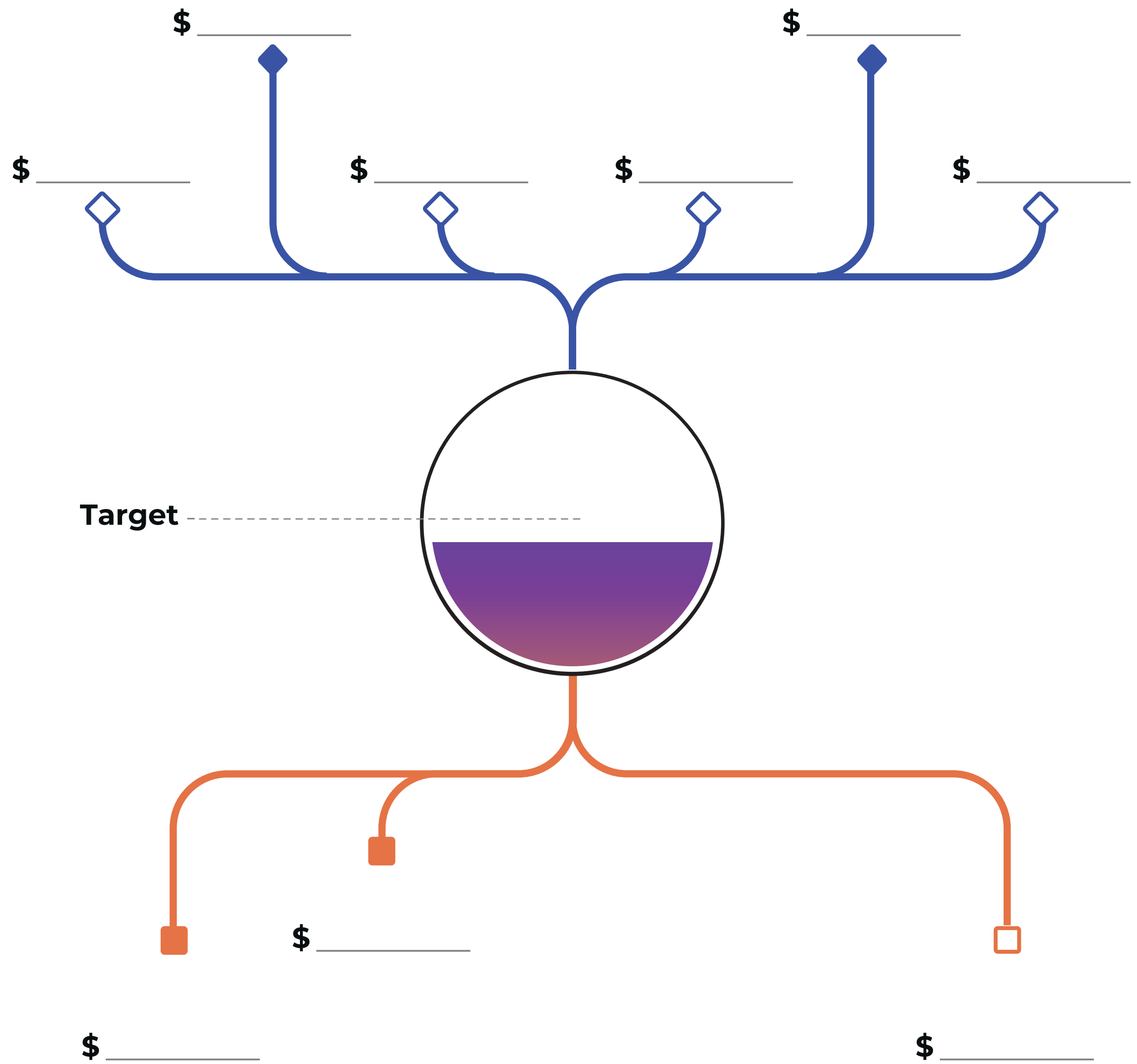
Cash Flow Engines



The Treadmill



Currence



To Do List

1 ____________________

2 ____________________

3 ____________________

4 ____________________

5 ____________________

6 ____________________

7 ____________________

8 ____________________

9 ____________________

10 ____________________

Notes

Financial Doctrine

currence

NAME OF CLIENT DATE

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Notes

3 Key Takeaways

1. What are the three key components of the optimal cash flow structure?

- Separating income from expenses
- Automating the RIGHT movements
- Having a real time feedback loop

2. Whats the key question to close the deal?

- Is there any reason why we should not do this for you?

3. When should you open the account for the client?

- While you're on the enrollment call

Action Item

Send a text to five people that says "Hey ______, I'm attending an event with some of the top financial minds in the industry discussing things that made me think of you. I'd like to take you through a cash flow exercise that I think would have a major impact on your success moving forward. What time next week works for you?"

The Right Amount. The Right Type.

David Mozeika

Insurance Type

Notes

3 Key Takeaways

1.

2.

3.

Action Item

Mortality Arbitrage for Retirement Income

Jason Goldstein

Notes

3 Key Takeaways

1.

2.

3.

Action Item

The Authority Advantage

Sean Platt &
Caleb DeLon

Notes

3 Key Takeaways

1.

2.

3.

Action Item


MADAN+
UNIVERSITY
MASTERCLASS

Using Currence as the Meaningful Differentiator

Bill Cates

Notes

3 Key Takeaways

1.

2.

3.

Action Item

The Currence Roadmap

Aashay Shah

Notes

3 Key Takeaways	Action Item
1.	
2.	
3.	

Discovering your Investment Philosophy

Daniel Salazar

Notes

3 Key Takeaways

1.

2.

3.

Action Item

The Calibration Session

Kristin Niedermeyer

Net Cash Flow

Income Movements

- [ ] ______________________ __________
- [ ] ______________________ __________
- [ ] ______________________ __________

TOTAL __________

- [ ] ______________________ __________
- [ ] ______________________ __________
- [ ] ______________________ __________

+TOTAL __________

= __________

Net Cash Flow __________

Target ----------

Spending Baseline

- [ ] ______________________ __________
- [ ] ______________________ __________
- [ ] ______________________ __________

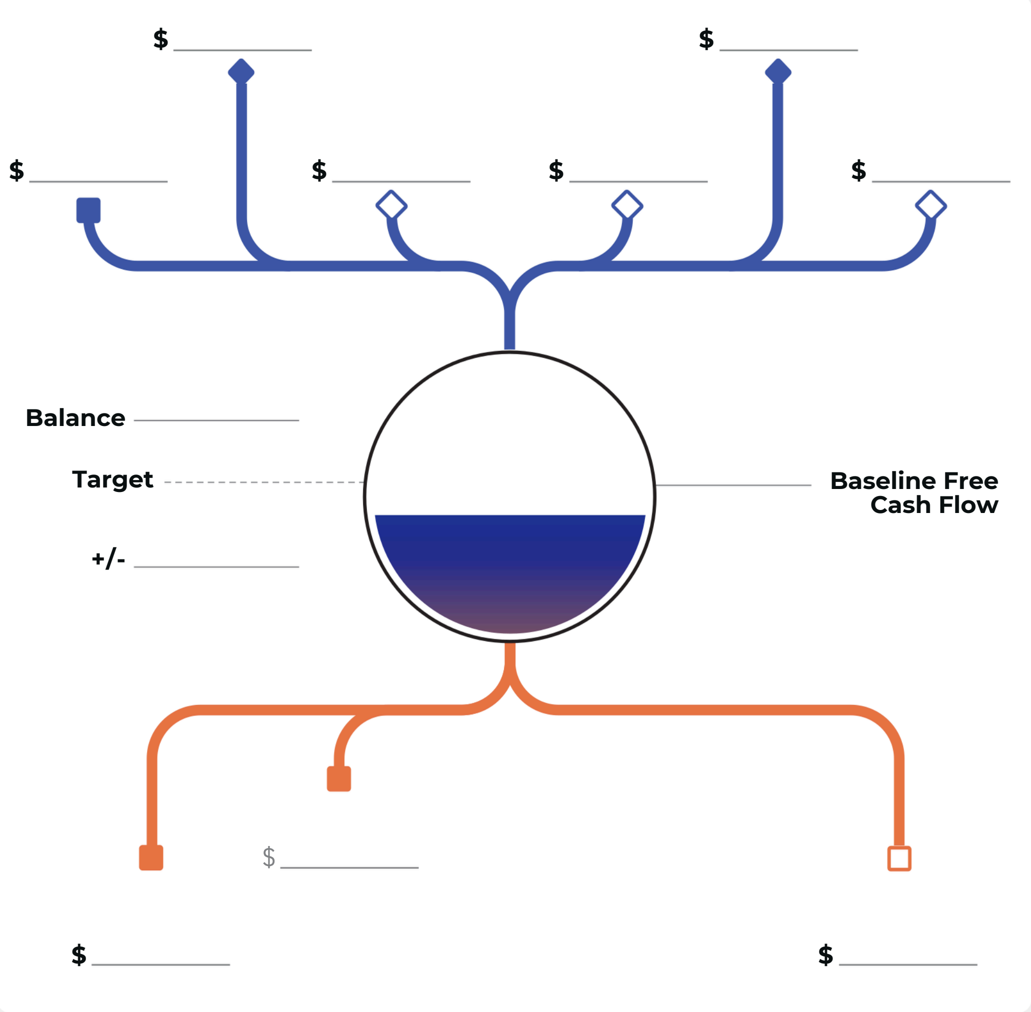
TOTAL __________

- [ ] ______________________ __________
- [ ] ______________________ __________
- [ ] ______________________ __________

+TOTAL __________

= __________

Calibration



		SCHEDULED	ONE-TIME
● ______	$ ______	☐	☐
● ______	$ ______	☐	☐
● ______	$ ______	☐	☐
● ______	$ ______	☐	☐
● ______	$ ______	☐	☐
● ______	$ ______	☐	☐
● ______	$ ______	☐	☐

Notes

3 Key Takeaways

Action Item

1.

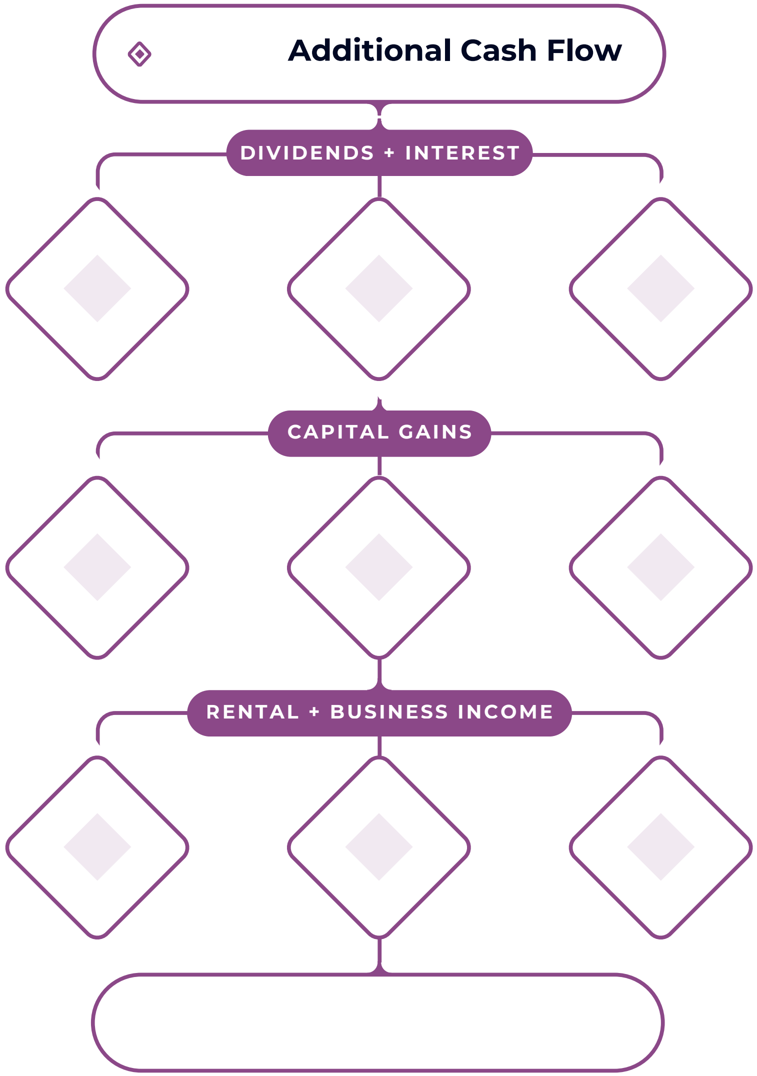
2.

3.

The Other Side of Page 3

Vince D'Addona

Cash Flow Engines



Notes

3 Key Takeaways

1.

2.

3.

Action Item

The Power of Client Segmentation

Jason Goldstein

Notes

3 Key Takeaways

1.

2.

3.

Action Item

Thank You To Our Sponsors

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