



OCTOBER 23-24, 2026
THE OPAL SOL RESORT
CLEARWATER BEACH, FL

FRIDAY SOCIAL EVENT SPONSORS



Advocacy Trust LLC

Kelli P. Gardner, Esq.
kgardner@advocacytrust.com
www.advocacytrust.com



Legacy Enhancement Trust

Andrea Metcalf
andrea@legacyenhancement.org
Judy Hansen-Rice
judy@legacyenhancement.org
www.legacyenhancement.org

BRUNCH SPONSOR



MassMutual Special Care

Jerry Hulick
jhulick@financialguide.com
Kelly Piacenti
kpiacenti@massmutual.com
www.massmutual.com/specialcare



True Link Financial

Chelsea Dennis
chelsea.dennis@truelinkfinancial.com
www.truelinkfinancial.com

MORNING BREAK SPONSOR



Midwest Trust Company

Martha Brown
martha.brown@midwesttrust.com
Lani Hoyt
lani.hoyt@midwesttrust.com
www.midwesttrust.com



Capital First Trust Company

James Creel
jcreel@capitalfirsttrust.com
Dan Sassano
dsassano@capitalfirsttrust.com
Stacy Scrip
sscrip@capitalfirsttrust.com
www.capitalfirsttrust.com

**THANK YOU TO OUR
SPONSORS & EXHIBITORS!**



OCTOBER 23-24, 2026
THE OPAL SOL RESORT
CLEARWATER BEACH, FL

2026 FALL MEETING EXHIBITORS



Colvent Group

Mackenzie Barttelbort
mackenzieb@colventgroup.com

Michaela Labrier
michaelal@colventgroup.com
www.colventgroup.com



Medivest Benefits Advisors

Jennifer Deinert-Peterson
jpeterson@medivest.com

Scott Mattingly
smattingly@medivest.com
www.medivest.com



National Care Advisors

Laura Alexander
laalexander@nationalcareadvisors.com
www.nationalcareadvisors.com



Prudent Investors

Jeremy Lau, CFA®, CFP®
jeremy@prudentinvestors.com
www.prudentinvestors.com



The Family Heritage Trust Company

Megan Fletcher
mfletcher@fhtrust.com

Ashley Goldsborough
agoldsborough@fhtrust.com
www.Fhtrust.com



**VISIT THE 2026 FALL MEETING PAGE
FOR MORE EVENT INFORMATION**