

Eastern Region Conference

Thursday, April 30, 2026

The Pyramid Club | 1735 Market St, 52 Floor | Philadelphia, PA 19103

7:00 AM	Arrival / Breakfast
8:30 AM	Welcome / Introductions Rob Norton
9:00 AM	Sponsor Introduction
9:05 AM	New Membership Classes Institute, New York & Boston Overview of the upcoming new membership class structure (still in rollout phase), including governance implications (e.g., bylaw updates, sunseting old classes).
9:50 AM	Networking Break
10:05 AM	Sponsor Introduction
10:10 AM	Funding and Investing in Societies Discussion of new Institute funding strategies, society-level reserve policies, encouraging societies to invest funding rather than accumulate it; the interplay between Institute support; local reserves and investment.
10:55 AM	Networking Break
11:10 AM	Sponsor Introduction
11:15 AM	Curriculum Evolution & Practical Skills Integration of practical skills (e.g., Financial Modeling Institute offerings, Python, etc.) New Level III pathways. Broader evolution of the curriculum toward employable, job-ready skills. AI (Artificial Intelligence) Impact
12:00 PM	Lunch
1:00 PM	Sponsor Introduction
1:05 PM	Member Value: Satisfaction / Growth & Retention Evergreen discussion on delivering and demonstrating ongoing value to members
1:50 PM	Networking Break
2:05 PM	Sponsor Introduction
2:10 PM	Breakout / Tabletop Discussions Potential Topics: University / Candidate Engagement, Mentoring & Engaging Older/Retired Members, Engaging Young Members, Sponsorship & Programing
2:55 PM	Wrap-up Session – Takeaways, Next Steps
3:30 PM	Conference Ends