

2026 Fairview Client Conference Agenda

Wednesday, June 17, 2026

Fairview, LLC

1330 Saint Mary's Street, Suite 400 Raleigh, NC
27605

Onsite Vendor Due Diligence (optional)

8:30 – 10:00

Presenters: Frank Watson, Manning Peeler
*Coffee and light bites will be provided.
Transportation will be provided to and from
onsite vendor due diligence.*

The Umstead Hotel and Spa

100 Woodland Pond Drive
Cary, NC 27513

Arrival, Lunch

11:00 – Noon

Introductory Remarks

11:45 – Noon

Presenter: Frank Watson

AI Uses and Best Practices

12:05 – 12:45

Presenters: Frank Watson, Madison Dewey,
C. Frank Watson

*As AI usage continues to rise, so do cybersecurity
concerns. The team will discuss common uses and
address common questions RIAs have regarding AI
usage.*

Break

12:45 – 1:00

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| Keynote: Shawn Ishler/Conflict Resolution Presenter: Shawn Ishler, Bartell & Bartell <i>Shawn Ishler, Executive Director of Bartell & Bartell, will facilitate a tailored, interactive workshop on conflict resolution. You will gain practical guidance on how to get the most out of conflict, based on your unique style and temperament.</i> | 1:00 – 2:30 |
| Break | 2:30 – 2:45 |
| Navigating Cybersecurity Scenarios Presenters: Jeremy McCamic, Madison Dewey <i>During this presentation, presenters will discuss cybersecurity-related scenarios, including step-by-step guidance from both a security and regulatory standpoint.</i> | 2:45 – 3:15 |
| Tabletop Exercises Presenter: Ellen Harvin <i>Each table will participate in interactive exercises on common compliance challenges.</i> | 3:20 – 4:15 |
| Closing Remarks Presenter: Frank Watson | 4:15 – 4:30 |
| Break / Regroup | 4:30 – 6:00 |
| Transportation Pick up | 6:00 |
| Happy Hour/Dinner <i>La Terrazza</i> 223 S West St., Ninth Floor, Raleigh 27603 | 6:30 – 9:30 |

Thursday, June 18, 2026

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| Breakfast | 8:00 – 9:00 |
| SEC Exam Process + Enforcement Presenters: Andrew Walsh, WilmerHale; Jeremy McCamic <i>Attorney Andrew Walsh, who previously served as an attorney in the SEC’s Division of Examinations, will walk through the examination process and enforcement actions, and provide an update on SEC Exam trends.</i> | 9:00 – 10:00 |
| Break | 10:00 – 10:05 |
| New Developments Presenter: Jeremy McCamic, Frank Watson <i>Updates on new and emerging technology and trends, such as prediction markets, crypto, and 401k alternative investments.</i> | 10:05 – 11:00 |
| Closing Remarks Presenter: Frank Watson | 11:00 – 11:15 |
| Lunch / Grab n Go | 11:15 – Noon |
| Conclude | Noon |

Note: Dress code for conference and dinner is business casual.



Questions?

If you have any questions regarding the upcoming client conference, please contact Grace Balk at Grace.Balk@viewpointpartners.co or Heather Ruth at Heather.Ruth@fairviewinvest.com.