



YOU'RE INVITED

The One Platform Advantage

May 28-29, 2026 | Minneapolis, MN

Join Simplicity and learn how to unlock the power of a unified securities platform. Discover how integrating investment and insurance solutions can help elevate your practice, enhance client value, and drive scalable growth.

More flexibility. More control. One powerful platform.

Wealth

Comprehensive RIA

Holistic Approach

Capture investment and insurance business

Proven Sales Process

Integrated technology, unique value, and training

Lead Generation and Marketing Support

Paid-for marketing campaigns for qualifying advisors

Institutional Trading Capabilities

Proprietary Risk Management and Monitoring

Direct Indexing and Tax-Loss Harvesting

Tax-Optimized Transitions

Retirement Plan Management

Robust UMA Framework and SMA Model Portfolios

Investments

Leading Broker-Dealer

Sensible Compliance

Competitive Payouts

Flexible Cost Structures

Personalized Support

Deep Product Expertise

Products from Reputable Carriers

Variable Annuities

Registered Index-Linked Annuities (RILAs)

Variable Universal Life

Private Placement Life Insurance

Retirement Plans and More

Securities Partners

Strategic Pathways for Helping More Clients and Maximizing Business Value

Simplicity Wealth Advisors Business Succession Planning

Protected Tomorrows Special Needs Planning and Advocacy

Retirement Plan Solutions and Executive Benefits

[Register Now](#)

Investment advisory and financial planning services are offered through Simplicity Wealth, LLC, an SEC-registered investment adviser. SEC registration does not constitute an endorsement of the firm, nor does it indicate that the adviser has attained a particular level of skill or ability.

Securities offered through Simplicity Investments, Inc., Member FINRA/SIPC, 475 Springfield Ave., Summit, NJ 07901, 303-797-9080

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Agenda

Thursday, May 28, 2026

3:00 pm	Welcome and Kickoff
3:45 pm	Advisor Business Journey
5:00 pm	Meeting Concludes
6:00 pm	Welcome Dinner

Friday, May 29, 2026

8:00 am	Wealth Platform
12:00 pm	Lunch
12:45 pm	Strategic Pathways
1:15 pm	Investments
2:30 pm	Partnership Opportunities
3:00 pm	Meeting Concludes

Venue

The Westin Edina Galleria | 3201 Galleria
Edina, MN 55435

Qualifications

Advisors must have a Series 6, 7, 65, or 66 Securities license to attend.

Cost

Simplicity will cover hotel accommodation at the Westin Edina Galleria for all advisors. For advisors with a Series 65 license and over \$3M+ in AUM, Simplicity will also cover airfare.

Simplicity Securities: The One Platform Advantage

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