



2026 Leadership Council Fall Summit

October 21–23 | Crystal Mountain

AGENDA

Wednesday, October 21, 2026	
6:00 – 8:00 p.m.	Welcome Reception for SBAM Leadership Council Members <i>Location: Lodge Deck Pavilion & Tent</i> <i>The reception will be held in a covered outdoor pavilion with heaters. Please dress comfortably for the evening's weather.</i>

Thursday, October 22, 2026	
Location: Northwest Territories Room; Crystal Center	
7:45 – 9:00 a.m.	Breakfast Mix & Mingle
9:00 – 9:15 a.m.	Welcome to the Fall Summit Leadership Council Voice: What We Heard and Where We're Going ▪ Gina Thorsen, Stormy Kromer, SBAM Board Chair ▪ Ginny Sherrow, Fenton Winery & Brewery, Leadership Council Board Chair
9:15 – 10:00 a.m.	Powered by Peers Panel Moderator: Ginny Sherrow, Fenton Winery & Brewery Panelists: • Jason Dodge, Black Truck Media + Marketing • Dr. Karen May, Momentum Health Center, LLC • Angela Morrill, Angela Morrill LLC • Carrissa Rondeau, Functional Behavior Services
10:00 – 10:05 a.m.	Sponsor Spotlight
10:05 – 10:50 a.m.	Build It. Protect It. Transition It. Practical Strategies for Ownership, Wealth & Retirement Planning Moderator: Michelle Beebe, SBAM

	Panelists: • Shannon Enders, Lakeshore Employee Benefits • Jamie Lopiccolo, Capocore Professional Advisors • Kelly Myers, Myers & Myers PLLC • John Rogers, Graystone Consulting, a business of Morgan Stanley
10:50 a.m. – 12:05 p.m.	Quick Connections: Speed Roundtables
12:05 – 1:00 p.m.	Lunch Buffet & Connection Time
1:00 – 1:05 p.m.	Sponsor Spotlight
1:05 – 1:35 p.m.	Regional Huddles: Ideas, Issues & Opportunities
1:35 – 2:20 p.m.	Around the Regions: Connections in Action
2:20 – 2:40 p.m.	Connection Time/Break
2:40 – 2:45 p.m.	Sponsor Spotlight
2:45 – 3:30 p.m.	Healthcare Discussion (SB1011)
3:30 – 4:15 p.m.	Taking the Pulse & Survey Update • Brian Calley, SBAM • Sarah Miller, SBAM
4:15 p.m.	Announcements & Adjourn <i>Break until Dinner</i>
6:00 – 8:15 p.m.	Flannel, Feud & Fireside Fun <i>Join us for dinner and entertainment back in the Northwest Territories Room; Crystal Center</i> <i>Dress Attire: Campfire Theme!</i> <i>Channel your inner lumberjack and sport your flannel!</i>

Friday, October 23, 2026	
10:00 a.m. - Noon	Morning on the Mountain Experience Reflection, Connection & What Comes Next <i>Ride the Crystal Clipper lift to the mountaintop for a memorable closing experience featuring time to reflect on the Summit, connect with fellow LC members and identify meaningful next steps to carry forward.</i> <i>We strongly encourage you attend; you won't regret it!</i> <i>This outdoor experience is weather permitting. Please dress comfortably and appropriately for the day's conditions.</i>

**Agenda is subject to change*

Thank You to the Fall Summit Sponsors

