# ELITE VFO COLLECTIVE

**JUNE 25-26TH, 2026**

*FUSION MASTERMIND DAY JUNE 24TH*

**SAN DIEGO, CALIFORNIA**

# Fusion Mastermind Day

*June 24th, 2026*

| | |
|---|---|
| **8:00 AM** | **Check-In & Breakfast** |
| **9:00 AM** | **Opening Comments**<br>Anton Anderson & Jena Wilson, Elite Resource Team |
| **9:50 AM** | **The Biology of High Performance:** The Hidden Drivers of Energy, Focus & Leadership<br>Dr. Tracy Gapin, Peak Launch |
| **10:40 AM** | **Break** |
| **10:55 AM** | **Panel:** Building a VFO Driven Company<br>Carson Grover, Gabriel Martin, Michael Simms, & Sterling Hirsch |
| **11:25 AM** | **Private, Institutional-Grade Currency Trading:** Diversification Beyond Traditional Markets<br>Jared Yellin, Vestige Capital, LLC |
| **12:15 PM** | **Lunch** |
| **1:30 PM** | **Inside the Tax Plan:** How a Taxpayer Turns Business Income Into Wealth*****<br>Tim Gacsy, Elite Resource Team |
| **2:00 PM** | **The Enterprise Value Conversation:** Driving Growth, Wealth & Opportunity<br>Deborah Snyder, Greg Maddox, Ken Smith, Jen McAllister, & Joe LoPresti |
| **2:50 PM** | **Break** |
| **3:10 PM** | **Case Study: When Strategy Needs the Right Team Around It**<br>Jen McAllister & Sterling Hirsch |
| **4:00 PM** | **Fusion Cocktail Hour** |

The Fusion Mastermind Day is a private gathering for Fusion members and their guests.
If you would like additional information, and are not currently a Fusion member,
please email support@elitert.com.

# General Session - Day 1

## *June 25th, 2026*

**7:30 AM** **Check-In & Breakfast**

**8:15 AM** **Opening Comments**
Anton Anderson & Jena Wilson, Elite Resource Team

**9:00 AM** **Estate Planning 201:** Advanced Planning for Business Owners & High-Net-Worth Families*
Nic Sasso, Dinsmore & Shohl, LLP

**9:50 AM** **Federal Tax Treatment:** Film Production Investments*
Kyle Fox, The Fox Financial Network

**10:40 AM** **Break**

**10:55 AM** **Earn Your Seat At The Owner's Table:** How Wealth Advisors Win with Value Acceleration
Deborah Snyder & Greg Maddox, Cultivate Advisors

***Oil & Gas Drilling Fund & QOZ 2.0: Tax Advantaged Wealth Creation** **| Breakout Room***
*Todd Lofgren, Alternative Tax Management*

**11:50 AM** **The Truth About Cost Segregation***
Heidi Henderson, Engineered Tax Services

***GFX / Leveraged Entity Ownership Strategy:** High Income or Capital Gains Tax Mitigation* **| Breakout Room***
*Michael Simms, Veracity Advisors*

**12:40 PM** **Lunch & Book Signing:** *The Science of Running a VFO* & *The Science of Building Accountant Partnerships*

**1:50 PM** **Rothish:** Premium Financing Made Easy
Darren Sugiyama, Lionsmark Capital, LLC

***Advanced Charitable Tax Planning:** Federal Tax Framework, Practical Applications & Case Studies* **| Breakout Room***
*Carson Grover, Innovation Advisory Group*

**2:40 PM** **Break**

**2:55 PM** **Solar as a Tax Strategy:** Beyond Tax Credits & Into Wealth Creation*
Justin Draplin, Fortified Solar

***Modern Qualified Plans:** Custom Tax Minimization Strategies* **| Breakout Room***
*Bruce Gendein, McHenry Advisers Inc*

**3:50 PM** **Who Killed the Company?** A Cybersecurity Murder Mystery
Will Foret & Justin Neagle, Spot Migration

***2 Businesses Under 1 Roof:** The Hidden Opportunity Within Your Advisory & Accounting Practice **| Breakout Room***
*Paul Latham, Elite Resource Team*

**4:40 PM** **Awards Ceremony & Cocktail Hour to Follow**

# General Session - Day 2

*June 26th, 2026*

| | |
|---|---|
| **8:00 AM** | **Breakfast** |
| | ***CPR Training with San Diego Cardiac*** ***\| Breakfast Room*** |
| **8:45 AM** | **From Transactions to Transformations:** Where Customers Become, Not Buy<br>Ron Baker, Threshold |
| **9:45 AM** | **VFO Portal:** The AI Powered Solution to Running Your VFO<br>Anton Anderson & Paul Latham, Elite Resource Team |
| **10:40 AM** | **Break** |
| **10:55 AM** | **Panel:** Accountant & Advisor Success<br>Missy Dennis, Monika Hengesbach, Nick Gardner, Paul Carmona, Stacey Andres, & Steven Cox |
| **11:50 AM** | **Powerful Concepts Made Stronger with Risk Mitigation For Your Clients**<br>Ken Smith, Assurance Ally |
| | ***Time's Up! The Subscription Business Model for Professionals*** ***\| Breakout Room***<br>*Ron Baker, Threshold* |
| **12:40 PM** | **Lunch** |
| **1:40 PM** | **Securing Your Firm's Future:** Succession Planning Insights for Accountants & Advisors<br>Todd Steinberg, Thrive Financial Group |
| | ***Modern Energy Storage Tax Planning:*** *A Virtual Family Office Due Diligence Framework** ***\| Breakout Room***<br>*Steven Cox, SDP, LLC* |
| **2:35 PM** | **How To Sell Tax Plans without Becoming a Sales Representative**<br>Anton Anderson, Evan Anderson, & Tim Gacsy, Elite Resource Team |
| **3:25 PM** | **Break** |
| **3:35 PM** | **Turning Opportunities Into Outcomes:** Making The Most of The VFO Model<br>Evan Anderson, Ian Welham, Jake Latham, Rachael Hopson, Sarah Freitas, Tim Gacsy, & Tracy Miller |
| **4:00 PM** | **Closing Comments & Raffle** |

Sessions marked with an asterisk (*) are eligible for IRS Continuing Education (CE) credit for Enrolled Agents (EAs). See page 11 for complete continuing education information and credit requirements. **Please note the following sessions are not eligible for CE or CPE credit: Panel: Building a VFO Driven Company & Turning Opportunities Into Outcomes: Making The Most of The VFO Model.**

# Meet Our Speakers

## ANTON ANDERSON

ELITE RESOURCE TEAM

Anton Anderson began his career in 2003 with Smith Barney while studying business in college and graduated from the University of California, Santa Barbara in the top 3% of his class. In 2008 he co-founded SPL Financial, which grew into a thriving practice, before selling in 2014 to start Elite Resource Team. Recognized as one of the top training companies for Financial Advisors and Accountants, Elite Resource Team has helped thousands of clients across North America. Anton has developed a diverse career as an investor, advisor, and accountant consultant. He is a multiple-time bestselling author whose latest books include The Science of Running a Virtual Family Office and The Science of Building Accountant Partnerships.
www.elitert.com

## JENA WILSON

ELITE RESOURCE TEAM

Jena Wilson began her career in 2011 specializing in sales, event management, and marketing before shifting to financial services in 2014. Jena quickly saw the opportunity for Accountants to partner with Financial Advisors to maximize their business potential - she later helped launch HaydenRock Solutions as an integral part of their team since its inception. In 2020, Elite Resource Team and HaydenRock joined forces. Now, as Senior Director, she works hand in hand with all members of the Elite communities, empowering them to build synergistic partnerships.
www.elitert.com

## PAUL LATHAM

ELITE RESOURCE TEAM

Paul Latham is a qualified Chartered Accountant and serial entrepreneur. He helped transform Lathams Chartered Accountants from a traditional practice to a forward-looking firm, which sold for $45 million in 2001. After helping take Debt Free Direct Group Plc public, Paul moved to the USA in 2011, where he now partners with Anton at Elite Resource Team, helping accountants maximize their potential through proactive planning strategies. Paul is a multiple-time bestselling author whose latest books include *The Science of Running a Virtual Family Office* and *The Science of Building Accountant Partnerships*.
www.elitert.com

## RON BAKER

THRESHOLD

Ronald J. Baker began his CPA career with KPMG in 1984. He is the co-founder of THRESHOLD and co-host of The Soul of Enterprise podcast. A renowned speaker and author, he has written eight best-selling books, including *Firm of the Future*, *Implementing Value Pricing,* and *Time's Up*. He has educated over 450,000 professionals worldwide and has been named among Accounting Today's Top 100 Most Influential People.
www.thresholdnow.com

## HEIDI HENDERSON

ENGINEERED TAX SERVICES

Heidi Henderson is the Chief Marketing Officer and Senior Tax Consultant at Engineered Tax Services (ETS), where she has served since 2012, and a Partner at Engineered Insurance Services. With a Master's Degree in Accountancy and nearly three decades of experience, Heidi is one of the nation's foremost specialists on engineering-driven tax incentives - cost segregation, R&D tax credits, energy-efficient building deductions, and federal & state incentive strategies. As host of the Slash Tax Podcast, she makes complex tax strategy accessible for business owners, investors, CPAs, and real estate professionals. A licensed Real Estate Professional, she has led industry-specific federal lobbying efforts in Washington, D.C., and provides technical guidance across a wide range of industry verticals.
www.engineeredtaxservices.com

## DARREN SUGIYAMA

LIONSMARK CAPITAL

Darren Sugiyama started his own employee benefits firm in 2003 called Apex and later founded Lionsmark Capital in 2016 which is now one of the most dominant premium financing intermediary firms in the life insurance industry. Darren is also an internationally acclaimed 12-time author, business coach, and mentor.
www.lionsmarkcapital.com

## JUSTIN DRAPLIN

FORTIFIED SOLAR

Justin Draplin is an entrepreneur and renewable energy executive specializing in solar development and tax credit monetization. He is the Founder and CEO of Fortified Solar and Eclipse Financing, where he helps connect high-income individuals and businesses with projects that include federal and state tax credits. Draplin has led the growth of multiple companies, including co-founding one of the fastest-growing private companies in the U.S. (INC 500). His work focuses on structuring solar investments to maximize Investment Tax Credits (ITC), accelerated depreciation, and tax equity outcomes. He has extensive experience working with CPAs, tax advisors, and investors to implement compliant, audit-defensible tax mitigation strategies. He has been featured on NBC Nightly News, Bloomberg TV, and in The Wall Street Journal, Crain's, and INC Magazine, amongst others.
www.fortifiedsolar.com

## KYLE FOX

THE FOX FINANCIAL NETWORK

Kyle Fox is an Executive Producer, CPA, and film production financier specializing in strategic tax planning for high-net-worth individuals, business owners, and entrepreneurs. He focuses on implementing IRS-supported strategies through a proactive advisory approach to improve tax efficiency and long-term outcomes. He is the Founder and President of The Fox Financial Network, a tax-focused financial services community that includes three accounting firms operated with managing partners. Kyle also develops tax-advantaged investment strategies across multiple industries. He continues to expand his network and design innovative, tax-efficient structures that deliver measurable value for clients.
www.foxfinancialpartners.com

## DEBORAH SNYDER

CULTIVATE ADVISORS

Deborah Snyder has enjoyed a more than 20-year career in sales, marketing, membership development, online education initiatives and strategic partner engagement. Deborah served as the VP of Membership and Community Outreach for NAWBO (National Association of Women Business Owners) and found her passion to help women business owners. Today, Deborah is the Director of Partnerships with Cultivate Advisors. In addition to building strategic partnerships, she also partners with committed entrepreneurs to propel their business beyond expectations. Cultivate provides the opportunity for business owners to gain perspective on their business with a complimentary growth assessment.
www.cultivateadvisors.com

## GREG MADDOX

CULTIVATE ADVISORS

Greg Maddox is a two-time business owner and Senior Business & Exit Advisor with Cultivate Advisors, where he helps founders transform their businesses into scalable, transferable assets that create greater freedom and long-term value. Drawing from his experience as both a business owner and former financial services professional, Greg specializes in helping owners align business strategy with tax, legal, wealth, and exit planning objectives. He was named Cultivate Advisors' 2025 Advisor of the Year, serves on the board of the Chicago chapter of the Exit Planning Institute, and is a recurring mainstage speaker at the EPI National Summit. Greg is also the co-author of Life First. Business Second. and is passionate about helping business owners build companies that support the life they want to live.
www.cultivateadvisors.com

## KEN SMITH

ASSURANCE ALLY

Ken Smith is the Founder and CEO of Assurance Ally, a boutique IMO designed for advisors and agents working in the Virtual Family Office model. With 30+ years in the industry and a career rooted in tax-efficient retirement planning, Ken helps advisors integrate insurance-based solutions into holistic, client-first strategies. After building a top 1% financial advisory practice and co-founding Elite Resource Team, Ken launched Assurance Ally to solve what most IMOs get wrong—impersonal support, lack of VFO experience, and inefficient product delivery. His team offers 1:1 advisor relationships, deep product access, and turnkey support, making it easier for advisors to deliver value without adding to their workload.
www.assuranceally.com

## WILL FORET

SPOT MIGRATION

Will Foret is the Founder and CEO of Spot Migration, an IT and cybersecurity firm that serves high-growth companies, particularly in the AEC industry. Since founding the company in 2012, he has led its evolution into a strategic IT partner focused on scalability, security, and operational performance. Will helps business leaders leverage technology to support sustainable growth and stronger organizational performance. He also hosts the *Building Scale* podcast, where he explores the lessons, systems, and leadership strategies that drive business growth with founders and industry experts.
www.spotmigration.com

## JUSTIN NEAGLE

SPOT MIGRATION

Justin Neagle is the Chief Storytelling Officer at Spot Migration, and a leading voice in helping AEC firms rethink technology as a growth driver, not just an operational necessity. He specializes in translating complex IT, cybersecurity, and digital transformation strategies into clear, actionable business advantages. With an educational background in criminology and a career that spans technology, marketing, and business strategy, Justin brings a unique perspective to helping organizations solve problems, manage risk, and drive growth. He also co-hosts the *Building Scale* podcast, where he interviews industry leaders to uncover practical lessons on leadership, innovation, and scaling successful businesses.
www.spotmigration.com

## NIC SASSO

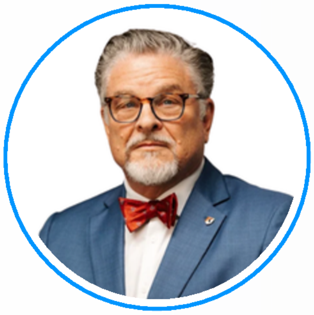
DINSMORE & SHOHL, LLP

Nicolas Sasso is a Partner at Dinsmore & Shohl in the firm's Estate Planning and Wealth Preservation practice. He advises individuals, families, and closely held businesses on estate, tax, and wealth transfer strategies designed to preserve and transition wealth across generations. His experience includes advanced estate planning, charitable planning, post-SECURE Act retirement planning, and business succession strategies involving Employee Ownership Trusts (EOTs), ESOPs, and other ownership transition structures. He also counsels business owners on pre- and post-transaction tax planning and sophisticated wealth transfer techniques, including GRATs, generation-skipping transfer tax strategies, and intentionally defective grantor trusts. Nicolas has been recognized for his commitment to pro bono service, receiving honors from Ohio Northern University, the 18th Judicial District of Arkansas, and Legal Aid of Arkansas.
www.dinsmore.com

## TODD STEINBERG

THRIVE FINANCIAL GROUP

Since 1994, Todd has worked exclusively with accounting and tax professionals to help them build, buy and sell practices nationwide. The scope of Todd's experience includes developing new marketing strategies, integrating financial planning into accounting practices and personally being involved as an intermediary in the sale of over 400 accounting and tax practices. Todd also speaks at regional and national conferences as an authority on succession planning and integrating financial planning into accounting practices. Todd is Series 7, 66, Life, Accident & Health Licensed.
www.thrivefinancialgrp.com



## MICHAEL SIMMS

VERACITY ADVISORS

Michael is an early adopter of technology in serving business owner clients and was among the first professionals to utilize BizEquity. Since 2014, he has worked with CPAs, attorneys, and business owners to deliver valuations, contributing to broader access and understanding of business value. With a background in leading and growing small businesses, Michael entered financial services to help owners make more informed decisions. Leveraging tools and frameworks from Business Enterprise Institute and Value Builder System, he helps clients understand the true, sellable value of their business and identify gaps that may impact a future transaction. While book value serves as a starting point, Michael focuses on highlighting the key areas that need attention to strengthen and maximize overall business value.
www.veracityadvisers.com

## BRUCE GENDEIN

MCHENRY ADVISERS, INC.

Bruce Gendein is a financial services industry veteran that has been in the business for more than 30 years, helping successful individuals and advisors tackle complex financial and retirement planning challenges. A sought-after speaker on the topic of Qualified Retirement Plans, Bruce spends much of his time touring the country to share his insights with financial services professionals. He has addressed MDRT's Top of the Table, LIMRA's Advanced Sales Forum, as well as corporate educational symposiums nationwide.
www.mchenry-advisers.com

## TODD LOFGREN

ALTERNATIVE TAX MANAGEMENT

Todd has over 25 years of experience in the financial services industry working with institutional asset managers providing investment solutions to financial advisors and CPAs. Todd utilizes his diverse background to partner with advisors, accounting and other professionals to deliver tax advantaged solutions for high-net-worth clients and small business owners. He specializes in helping professionals uncover planning opportunities that may reduce tax exposure, improve portfolio efficiency, and support broader wealth preservation objectives.
www.alternativetaxmanagement.com

## TRACY GAPIN, MD

PEAK LAUNCH

Tracy Gapin is a physician, entrepreneur, and founder of Peak Launch, a Precision Performance Medicine platform designed to help high-performing leaders optimize energy, focus, resilience, and overall performance. After more than 25 years as a board-certified urologist, Dr. Gapin left traditional medicine to build a proactive, performance-driven healthcare model that combines advanced diagnostics, medical optimization, coaching, wearable data, and real-time accountability. Through Peak Launch Institute, he also trains physicians to implement this next-generation healthcare approach while building scalable practices and reducing burnout. Dr. Gapin is a TEDx speaker and bestselling author of *Male 2.0* and *Codes of Longevity*, with his upcoming book *Doctor 2.0* set for release in 2026.
www.gapininstitute.com

## JARED YELLIN

VESTIGE CAPITAL, LLC

Jared Yellin is a serial entrepreneur, investor, and founder with more than 15 years of experience building and scaling companies across marketing, education, technology, and financial services. He has helped thousands of entrepreneurs grow their businesses through innovative platforms, strategic partnerships, and forward-thinking business models. As the founder of an innovative trading platform focused on FOREX and alternative asset classes, Jared applies advanced analytics, disciplined risk management, and data-driven strategies to uncover opportunities often overlooked by traditional investors. He is also the creator of SYNDUIT, an early marketing automation platform designed to help small businesses streamline growth. Jared is known for challenging conventional thinking and helping others identify opportunities that create lasting value.
www.vestigeholdingsgroup.com

## CARSON GROVER

INNOVATION ADVISORY GROUP

Carson Grover, EA, specializes in tax-efficient financial planning for small business owners and pre-retirees. As an IRS-licensed Enrolled Agent, a federal tax expert authorized to represent taxpayers before the IRS, Carson focuses on helping clients legally reduce their lifetime tax burden while aligning their financial plan with their long-term goals. Carson regularly collaborates with CPAs, attorneys, and other tax professionals to design and implement advanced strategies related to business succession, income tax mitigation, liquidity events, estate planning, retirement income planning, and asset protection.

## STEVEN COX

SDP, LLC

Steven co-founded SDP Personalized Planning to help business owners & entrepreneurs ensure their business success translates to personal financial success while also regaining their time. He focuses on leveraging evolving financial planning technologies and coordinating teams of financial, tax, and legal experts to continually improve outcomes for the people he works with. As a CFP® professional and CEPA®, Steven is passionate about helping business owners align their personal, business, and financial goals through proactive planning and strategic collaboration.
www.sdputahadvisors.com

## TIM GACSY

ELITE RESOURCE TEAM

Timothy Gacsy, CPA, PFS, CGMA, MBA, MBT brings 25+ years of experience in finance, tax strategy, and advisory leadership to his role as In-House CPA at Elite Resource Team. He oversees internal financial operations while supporting advisors nationwide through the firm's Virtual Family Office, with a focus on advanced tax strategies for business owners and high-net-worth clients. His career spans senior leadership roles at Private Client Services, LPL Financial, and Enterprise Community Investment, as well as advisory positions at McGill & Hill Group, Ernst & Young, and CohnReznick. Tim holds CPA licenses in NC and SC, FINRA Series 27 & 99, and advanced degrees from USC and Indiana University.
www.elitert.com

## TRACY MILLER

ELITE RESOURCE TEAM

Tracy Miller began her career after attending San Diego State University, where she received her Bachelor's Degree in Kinesiology. She later received her Master's in Health and Wellness Psychology from the University of the Rockies. Tracy has taken her past experiences and evolved into her position as the VFO Liaison. All the roles she has held have been client/people-forward, and she has helped to guide, diffuse situations, and investigate to problem-solve, which she continues to excel in at Elite.
www.elitert.com

## IAN WELHAM

ELITE RESOURCE TEAM

Ian Welham began his career qualifying in the UK as a Chartered Accountant with Ernst & Young. He then left public practice and became CFO of a Barcelona-based publicly traded company. Subsequently, Ian held CEO and COO positions in Hong Kong, The Netherlands, Belgium, and the US. In 2016 he co-founded HaydenRock Solutions, working hands-on with CPA firms to help them become 21st-century accountants. Following the merger of Elite Resource Team and HaydenRock in 2020, Ian now focuses on building relationships with Elite members and providing them coaching services to help them Maximize Business Potential and become the Most Relevant Advisor to their clients.
www.elitert.com

## RACHAEL HOPSON

ELITE RESOURCE TEAM

Rachael brings over 12 years of experience in healthcare recruiting, with a focus on building strong relationships and scalable recruiting systems that drive long-term growth. As Member Relations Manager at Elite Resource Team, Rachael focuses on bringing a relationship-driven and systems-focused approach to advisor and accountant recruiting, member onboarding, and long-term member success. She works closely with members and strategic partners to help ensure a seamless, high-value experience across the ERT community.
www.elitert.com

## SARAH FREITAS

ELITE RESOURCE TEAM

Sarah Freitas began her career after graduating from the University of California, Santa Barbara, where she studied Sociology with a minor in Applied Psychology and served on the Community Affairs Board. Her academic focus on human behavior, systems, and community development shaped her early work in the nonprofit sector, where she supported environmental organizations through professional fundraising and relationship-based outreach. As her career evolved, Sarah recognized her strength in supporting individuals within growing communities, helping them stay engaged, confident, and equipped to succeed. That path led her to Elite Resource Team, where she now serves as the Member Success Manager.
www.elitert.com

## EVAN ANDERSON

VFO SERVICES

Evan Anderson brings a diverse background spanning hospitality, media, and entertainment. He began his career in restaurant management before transitioning into broadcasting at FOX 9, where he held roles in talent coordination, master control, and directing. He later moved to Los Angeles, working as a Stage Manager on the FOX Studio Lot, supporting productions across television, film, and commercial projects. His work centered on delivering exceptional service and ensuring seamless collaboration across teams. Evan now serves as a Proactive Facilitator for VFO Services, where he applies his people-first approach to foster strong partnerships.
www.vfo-services.com

## JAKE LATHAM

VFO SERVICES

Born and raised in England before moving to the US in 2011, Jake Latham initially joined Elite Resource Team in 2024, before becoming Data Manager in January 2026. His work focuses on improving reporting systems, organizing member training data, and streamlining accounting processes. He has developed tools that link operations and generate accurate KPIs, helping make day-to-day functions more efficient. Jake studied Business Management, with a focus on entrepreneurship, at Bentley University, graduating Magna Cum Laude in December 2025.
www.vfo-services.com

# Continuing Education Credits Available

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- Up to 16.5 CPE Credits Available
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- Program Level: Basic, Intermediate, Advanced
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- Prerequisites: This conference is designed for financial professionals, tax professionals, attorneys, insurance professionals, and other advisors. A general understanding of business, tax, financial, legal, or wealth-planning concepts is beneficial; however, no specific prerequisite knowledge is required. Individual sessions may range from introductory to advanced levels.
- Advanced Preparation: None

Elite Resource Team is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education.

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- Credit will be reported upon successful completion of program requirements

## Important Information

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Credit amounts may vary depending on the sessions attended.

Certificates of Completion will be distributed within 7–10 business days following the event.

Please visit [elitert.com/elite-vfo-collective](elitert.com/elite-vfo-collective) for full continuing education disclosures, attendance policies, and sponsor information.

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