

E3 NEXUS:

Elevate. Empower. Evolve.

(Formerly known as the Business Owner Planning Summit)



Thursday, February 26, 2026 | Pechanga Resort & Casino | Temecula, CA

EVENT DESCRIPTION

Step into the next evolution of advanced planning and business-owner strategy at E3 Nexus, NAIFA-California's premier gathering for forward-thinking advisors, planners, and professionals serving high-income earners and entrepreneurial clients. Formerly known as the Business Owner Planning Summit, this enhanced experience brings even greater depth, expertise, and collaboration—all in one powerful day designed to help you elevate your practice, empower your clients, and evolve with a rapidly changing landscape.

Join us in Southern California for dynamic sessions led by nationally recognized experts, in-depth discussions on emerging tax strategies, and real-world insights you can take straight into your client conversations. Whether you're focused on complex tax planning, retirement strategies, business transitions, or holistic advisory work, E3 Nexus equips you with the tools to thrive.

REGISTRATION



\$99 – Members
\$149 – Non-Members
Lunch included
Don't wait to register –
seats will fill up fast!

Website: <https://ca.naifa.org/e3-nexus>

Date: Thursday, February 26, 2026

Time: 8:00 AM – 5:00 PM PT

Location: Pechanga Resort & Casino
45000 Pechanga Pkwy #45000
Temecula, CA 92592

KEYNOTE

AI Made Simple – How to Become a Superhuman Advisor and Skyrocket Your Productivity with Business Owners!

Panos Leledakis

BREAKOUTS

Premium Finance, Split Dollar & the New Tax Efficiency Toolkit

Guy Baker, Ph.D., MBA, MSFS, CEPA

Cracking the Code: Advanced Tax Planning for High-Income Earners

Bruce Jones

Tax-Deductible Life Insurance in Retirement Plans: Section 412(e)(3) Secrets

Nicholas Paleveda, MBA, J.D., LL.M

PANELS

PANEL #1

Protect, Grow, Sustain: The Business Owner's Risk & Capital Playbook

Ray LaDieu, CFP, ChFC

Michael Fisher

David Wood

Moderator: Jason Foster, LACP

PANEL #2

Unlocking Wealth with Tax Optimization

Shelley Lightfoot, CEPA

Stephen Alloy

Natalie Elser, CPA

Moderator: Janise Graham, CEPA, LACP, CLTC

