

CSSI SUMMIT 2025

**RIA'S * ADVISORS * WEALTH MANAGERS * FAMILY OFFICES * INSTITUTIONAL
FIND AND NETWORK WITH FIRMS THAT LOOK LIKE YOURS**



WealthTech Select



**REGISTER AT:
CSSISolutions.com**

SUNDAY, APRIL 27 - TUESDAY, APRIL 29, 2025

Sunday Welcome Reception 6:30-8:30pm

Monday Full-Day Meeting 7:30am-4:00pm +
Networking Event @ Disney Springs 6:00-9:00pm

Tuesday (OPTIONAL)
One-on-One Vendor Meetings 9:00am-1:00pm



**HOW TO BOOK YOUR
ROOM**

EVENT LOCATION & ACCOMMODATIONS

Hyatt Place Orlando / Lake Buena Vista
Discounted Rooms available for \$125/night + tax

[Book Online](#) at Hyatt.com

Or call 1-888 HYATT HP (1-888-492-8847)

use Group Code **"G-CSSI"**

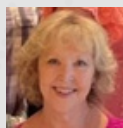
Orlando

April 28th

2025

Community
Retention
Peers
Reporting
Performance
Cyber Security
Attribution
Growth
Processes
Compliance
Trading
Sales
Artificial Intelligence
Operations
Client Services
Style

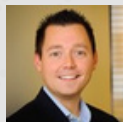
CONFIRMED SPEAKERS



Diane Herrera - CSSI Solutions

Founder and President of CSSI.

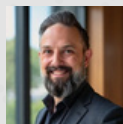
Sharing industry trends, operations best practices, and how to maximize your organization's investment in your systems



David Wyzynski - CSSI Solutions

Director of Cloud Operations of CSSI

Discussing system security and the cloud-based enterprise – pluses and pitfalls



James Cantwell - WealthTechs Select

Founder of WealthTechs Select

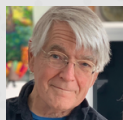
The approach of "improvement." – identifying focus areas – whether they be services, products, processes, or cultures – that can be improved.



Kim Cash - Cascade Compliance & Verification

Founder and President

Managing composites and maintaining compliance in your performance marketing



John Norwood - CompositeBuilder

Founder and President of Norwood Consulting

Strategies for Maintaining Composites and Performance Calculations