

NEWS



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CONTACT:

Dori Thomas

Impact Communications, Inc.

913-649-5009

DoriThomas@impactcommunications.org

2026 T3 Technology Conference Announces Keynote Speakers and AI University Staff

Hands-on AI training, insightful and actionable keynotes, and Big Easy networking set the stage for the wealth management community's defining conference

FORT LAUDERDALE, FL [February 10, 2026] — [T3's Technology Conference for financial professionals](#), which is widely known as the wealth management industry's most established and trusted technology event, announced keynote speakers and more details for AI University, bringing together the brightest minds in fintech, AI innovation, and financial advisory management.

“The T3 conference for me is a special place. It is the only conference that I will never miss,” said **Craig Iskowitz of Ezra Group**, one of the industry's top wealthtech consulting firms. I've been going for 15 years+ and the reason is that it has become, thanks to the great work of Joel Bruckentstein, the go-to wealthtech event. I've found that T3 provides opportunities to meet people - the networking opportunities are fantastic — and every vendor you meet and talk to is going to be there.”

“T3 has a tremendous number of wealth management firms show up because they want to see all the vendors. So this is why I always want to go to T3. And no matter what's counterprogrammed against T3, I'm always going to go to T3 before anything else. I like the education, the panels are always great, and the team always picks very interesting topics to discuss. There's a lot of core technology and core advisor information, so I get a lot out of it. This is why I recommend everyone in the wealth management space go to T3,” Iskowitz, who will be serving as a “professor” on T3's AI University Faculty, said.

Watch Craig Iskowitz's video endorsement of T3 here:

<https://vimeo.com/channels/t3videochannel/1161605016>

AI UNIVERSITY: A FIRST-OF-ITS-KIND EXPERIENCE

New for 2026, #T32026 will open with T3 AI University, a full day of immersive, one-hour AI sessions designed specifically for financial advisors and wealth management professionals, with no prior AI or coding experience required. Each session emphasizes real-world, hands-on use

cases, including live builds of AI-enabled tools and workflows that attendees can take back to their firms.

The first six sessions have been announced:

- Oleg Tishkevich of [Invent](#) will demonstrate how to make AI work with the advisor's actual client data in a live demonstration of what's possible when they connect AI to clean data coming from all their systems through an enterprise data lakehouse.
- Raj Madan of [AdvisorEngine](#) will discuss how to avoid AI slop in a session that will help advisors learn how to provide and maintain better context for any LLM so that they can have a more valuable AI "conversation."
- John O'Connell of [The Oasis Group](#) will show how wealth managers can leverage today's leading AI tools to enhance every step of their business process with live demonstrations of tools like Claude, ChatGPT, CoPilot, Gamma, and more to help advisors leverage off-the-shelf AI tools.
- Sean Sandys of [Syntax Data](#) will demystify MCP and vibe coding through a practical demonstration of building a custom MCP server from scratch using AI-assisted development, illustrating how tailored integrations can be created to meet specific business needs.
- Victoria Toli of [FINNY](#) will share how to use AI to identify money-in-motion events and intent signals buried in publicly available data, craft hyper-targeted communications that actually convert, and create proactive client experiences that drive referrals.
- Craig Iskowitz of [Ezra Group](#) is slated for a session on AI essential knowledge, with the full description coming soon.

Additional AI University "professors" are being announced as information is submitted by the presenters. Shannon Rosic of [Wealth Management](#) will serve as an emcee for the day. Rosic and her WMTV video team will also be onsite shooting conference videos.

Attendees interested in a video interview can find more information here:
<https://t3conferences.com/elevate-your-brand-with-wmtv-videos-at-the-2026-t3-conference/>.

"The opportunities are unprecedented. AI University is designed to help advisors move through three critical stages: AI Adoption, Taming AI, and Staff Repositioning," said **Joel Bruckenstein, CFP®, lead orchestrator of the annual T3 Conference**. "This isn't about theory – it's about practical implementation you can take back to your firm immediately."

Learn more about the AI University Faculty and sessions here:
<https://t3conferences.com/2026-ai-university-line-up-and-faculty>

FEATURED KEYNOTE SPEAKERS ANNOUNCED

The 2026 T3 Conference theme, "From Noise to Knowledge: The FinTech Playbook for 2026 and Beyond," addresses a critical challenge facing financial advisors today. With an overwhelming array of fintech solutions flooding the market, T3 2026 helps advisors cut through the clutter to identify technologies that truly drive efficiency, growth, and better client outcomes. The distinguished lineup of keynote speakers will help advisors cut through said noise with thought-provoking panels, core technology topics front and center in advisors' minds, and actionable insights on AI and fintech innovation – essential for advisors navigating the 2026 AI revolution.

Featured speakers so far include:

- William “Bill” Bengen, Best Selling Author of “[A Richer Retirement](#)” and creator of The Bengen Rule
- Reed Colley of Orion
- Bob Veres of Inside Information
- Suzanne Siracuse of Siracuse Consulting
- Rich Cancro of AdvisorEngine
- Darren Tedesco of Advisor360
- Rob Baldwin of TradePMR
- Kevin Hughes of Advyzon
- Larry Roth of Ascentix
- Gerald Michael of Smartleaf
- Tony Leal of ABL Tech Consulting
- Parker Ence of Jump
- Brian McLaughlin of Hamachi
- Aaron Klein of Contigo
- Patrick Shaddow of Syntax Direct
- Chris Hastings of Panoramix
- Rob Nance of Dispatch
- Brian Hamburger of MarketCounsel
- Paul Erlichman of FLEXTION
- Dave Feldman of Greenboard
- Thomas Stewart of Hadrius
- Babu Sivadasan of JIFFYAI
- Andres Garcia-Amaya of Zoe Financial
- Chirag Ghandi of Mili
- And many more

“T3 has always set the standard for bringing together the sharpest minds in wealthtech – from fintech founders to industry pioneers like Bill Bengen,” said Bruckenstein, “Our 2026 keynotes and sessions continue that tradition, delivering not just big ideas but practical playbooks advisors can implement right away to thrive in the agentic AI era.”

Click to learn more about keynote speakers and the agenda:

<https://t3conferences.com/2026-agenda/>

T3 WEEK IN NEW ORLEANS = BIG EASY NETWORKING AND UNFORGETTABLE EXPERIENCES

In addition to its packed agenda, the 2026 T3 Technology Conference will again lean into its reputation for combining high-value content with memorable experiences. The downtown Hyatt Regency New Orleans location places attendees within walking distance of top restaurants, jazz clubs, and the city's iconic nightlife on free evenings.

Notable social networking events:

1. **Opening Night Reception** – compliments of Nitrogen
In the Grand Exhibit Hall – Tuesday, March 10th – 6:00-7:30 pm
2. **Craft Beer Tasting** – compliments of AdvisorEngine
In the AdvisorEngine booth – Wednesday, March 11th – 5:30-6:30 pm
3. **Bourbon Tasting** – compliments of AdvisorEngine
In the AdvisorEngine booth – Thursday, March 12th – 3:00-4:30 pm
4. **FinTech Party**
At Jack Rose & The Parlor (in the Pontchartrain Hotel) 7:30 PM – 10:00 pm

These exclusive networking events, combined with private sponsor dinners and informal gatherings throughout the week, offer advisors unparalleled opportunities to connect with fintech innovators, enterprise leaders, and peer firms in the vibrant backdrop of New Orleans, turning professional development into lasting relationships and meaningful collaborations.

PRESS PASS INVITATION FOR JOURNALISTS

Members of the press interested in attending the conference and covering T3 2026 are invited to request a press pass by contacting:

Dori Thomas
Impact Communications, Inc.
DoriThomas@ImpactCommunications.org
913-649-5009

ABOUT THE T3 TECHNOLOGY CONFERENCE 2026

The T3 Technology Conference is the wealth management industry's leading event focused on advisor technology, innovation, and practical implementation. Taking place March 9–12, 2026, in New Orleans, T3 brings together financial advisors, wealth management executives, fintech leaders, and technology decision-makers to explore how technology is shaping the future of advice.

The 2026 conference theme, “From Noise to Knowledge: The FinTech Playbook for 2026 and Beyond,” reflects T3’s long-standing mission to help advisors cut through an increasingly crowded fintech landscape. Through hands-on demos, real-world use cases, and direct access to fintech innovators, T3 enables attendees to evaluate, compare, and implement the technologies that best support efficiency, scalability, and superior client outcomes.

With four days of immersive programming – including the new AI University, a robust exhibit hall, and peer-driven learning – T3 delivers actionable insights designed to help advisory firms make smarter technology decisions today and build stronger practices for the future.

For more information, visit <https://T3Conferences.com/>

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