

All meetings take place in Bougainvillea 1.



8:00 - 9:00 AM | Breakfast Buffet at Bougainvillea 2



9:00 - 9:15 AM | Introductory Remarks

Speaker: Coby Johnson



9:15 - 10:00 AM | Opportunity Zone Funds and the Impact of OZ 2.0

Speakers: Robbie Bernstein, Matt Woehner - With OZ 2.0 taking effect in the new year, this session will explore the impact of the changes, where OZ funds sit in the tax-deferred investment landscape, and the utility in investor portfolios.

10:00 - 10:45 AM | Four Springs Firm History & Operational Track Record

Speakers: Coby Johnson & Matt Woehner Gain insights into the principles driving the firm's success and how Four Springs has become a trusted leader in the 1031 Exchange and DST space. Learn how Four Springs has consistently delivered value through strategic acquisitions, rigorous asset management, and a commitment to innovation and transparency.



10:45 - 11:15 AM | Coffee Break



11:15 AM - 12:15 PM | Vintages and the Impact of Acquisition Year on DSTs

Speakers: Jared Morgan & Bill Dioguardi - A detailed look at the macroeconomic factors shaping the commercial real estate market, with a focus on DSTs. This session will explore how market trends impact DSTs and their full cycle performance.



12:15 - 1:15 PM | Buffet Lunch at Nikai Sundeck



1:15 - 2:15 PM | Assessing Credit Risk and Underwriting Tenants

Speakers: Alex Phillips & Jared Morgan - A conversation exploring the importance of tenant credit and its impact on acquisition and investment decisions.

2:15 - 2:45 PM | Behind the Scenes of Building a DST

Speakers: Jared Morgan, & Bill Dioguardi - Gain insights into the considerations and decisions that go into forming a DST while debunking common misconceptions about the structure and syndication process.



2:45 - 3:00 PM | Refreshment Break



3:00 - 4:00 PM | Due Diligence Frameworks

Speaker: Houston Hyde, Coby Johnson - A third-party perspective from FactRight on due diligence frameworks and evaluating DST sponsors.

4:00 - 5:00 PM | Lifecycle Management of a DST

Speakers: Bill Dioguardi & Jared Morgan - The lifecycle of a DST begins before acquisition and ends long after syndication. Learn more about every stage through a collaborative discussion.



6:00 - 9:00 PM | Cocktail Reception & Dinner at Pierre's, Morada Bay

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9:00 - 10:00 AM | The DST Exit: What Are the Options

Speaker: Coby Johnson - Discussion on the exit paths for DSTs and the considerations for the Sponsor and the Advisor.



10:00 - 10:30 AM | The 1031 Academy: Education for Advisors

Speakers: Matt Woehner - Education is a key component for advisors to recognize these opportunities in their book of business, have client conversations, and expand the use of DSTs.



10:30 - 10:45 AM | Refreshment Break



10:45 - 11:45 AM | Due Diligence Open Mic

Speakers: Bill Dioguardi – An open forum for attendee discussion on sponsors, current offerings, and closed offerings.



11:45 AM - 12:00 PM | Closing Remarks

Speaker: Coby Johnson



12:00 - 1:00 PM | Boxed Lunches & Departures

Boxed lunches served in the Bougainvillea Courtyard. Guests depart at their convenience.