



PRESENT

ACCELERATE **2026**

Connecting the Dots

**Where Financial Marketing, Compliance, and
Distribution Come Together**

April 19–22, 2026 | Austin, TX | Hotel ZaZa 

Conference registration cost: Free to attend

Why Accelerate Matters for Marketing & Distribution Leaders in Financial Services

Accelerate 2026 is an industry conference focused on enabling sales and marketing leaders to collaborate with their compliance counterparts on how to **get the right content into the field—faster and at scale, while mitigating risk.**

This year's format is intentionally redesigned to combine:

- **Industry-specific sessions** led by peers and experts
- **Best practices and real-world use cases** across 4U and Red Oak
- **Hands-on tips and workflows** that teams can apply immediately

All in an environment built for meaningful networking with influential peers across the financial ecosystem.

Who Should Attend

Accelerate is built for professionals who support complex partner ecosystems, including:

- Directors of National Accounts & Partnerships
- Heads of Marketing and Distribution Marketing
- Marketing Operations & Content Operations Leaders
- Marketing Compliance & Governance Leaders

Whether you're focused on **strategic partnerships, advisor adoption, AUM growth, or operational efficiency**, Accelerate is designed to meet you where you are.

Why 4U + Red Oak Leaders Should Attend

Accelerate brings together the **entire ecosystem**—investment companies, wealth managers, and technology partners—to talk honestly about what's working and what's not.

You'll connect with peers who are:

- Managing dozens of partners and thousands of content assets
- Under pressure to move faster without increasing risk
- Rethinking how content, approvals, and usage data flow across teams

The conversations don't stop at sessions—there's ample time built in for networking, peer exchange, and relationship building throughout the event.

What You'll Learn

Industry Perspectives You Can't Get Elsewhere

Hear directly from leaders navigating the same challenges you face—scaling content, supporting advisors, managing partner relationships, and keeping pace with market and regulatory change.

Featured Industry Speakers:



Derek Stern

AVP and Global Head of Distribution Compliance
John Hancock/Manulife



Mike Foy

Senior Director and Head of Wealth Intelligence
J.D. Power

Practical Sessions Across 4U & Red Oak

- How leading investment companies and wealth managers are simplifying partner content submission
- Ways to reduce cycle time and rework while increasing distribution reach
- How marketing, compliance, and distribution teams can work from a shared system of record—reducing friction and driving growth
- Best practices for confidently enabling advisors with timely and compliant content on topics that their clients care about

Marketing-Focused Takeaways

- Scale content without losing control
- Improve partner alignment and engagement
- Reduce friction across approval and distribution workflows
- Support digital and social channels with confidence

● The Experience (Yes, we'll have fun!)

Accelerate isn't just informative—it's designed to be memorable.

- Hosted meals, snacks, and networking breaks throughout the conference
- Evening events featuring Austin food, music, and culture
- A relaxed environment that encourages real conversations, not rushed intros

All included with registration.

● Cost & Registration

- ✓ Conference registration is free for Red Oak and 4U clients and partners
- ✈ Attendees cover travel and hotel
- 🗣 We provide multiple meals, snacks, and entertainment throughout the event
- 👉 Learn more and register: redoak.com/events/accelerate-2026/

● Bottom Line

If your role involves **driving content adoption, supporting partners, reducing friction, and scaling marketing in a compliant way**, Accelerate 2026 is the one industry event worth your time.

