



A

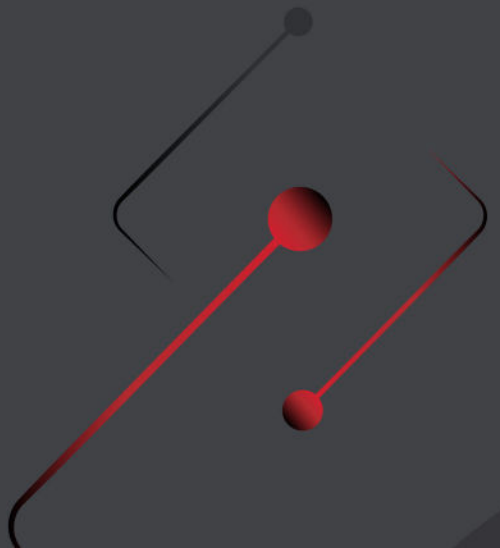
26



2026

ACCELERATE

 RED OAK PRESENTS






Accelerate

Dave Dutch • Red Oak CEO

ACCELERATE 2026





You are all here intentionally



Compliance. Marketing. All in the same room. By design.

ACCELERATE 2026





Compliance Connectivity Platform

ACCELERATE 2026

16 YEARS

The people who built
this are still in the room

Innovating, with your input, through all of it.

ACCELERATE 2026



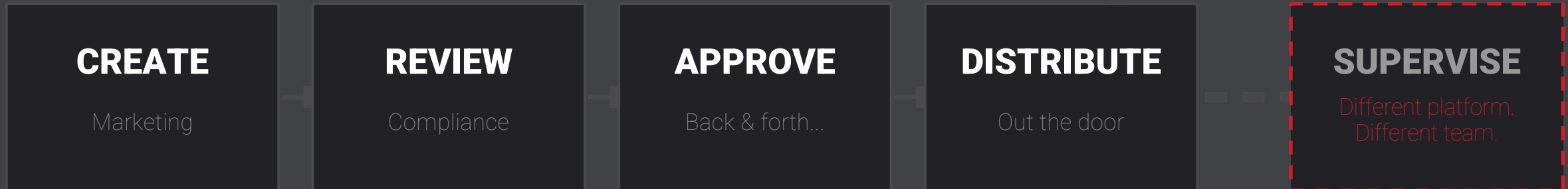
Stephen Pope

Co-Founder, Red Oak

1962-2025



The process the industry has been running for decades:



back-and-forth... back-and-forth... back-and-forth...

No connection back to what was said, shown, or distributed.

What should take hours can take days. Weeks. Sometimes months.

THE MOMENT

\$84T

Largest wealth transfer
in history – underway now

46%

of financial advisors
retiring in the next 10 years

85+

Channels. Every one of them
needs to be supervised

AI

A revolution for sure, but still
early in the race...

Built by people who have never...

- Sat in a CCO seat
- Never navigated an SEC or FINRA examination
- Never had to sign their name on a books-and-records attestation
- Compliance is an afterthought rather than the foundation

COMPLIANCE-GRADE AI™

Purpose-built

Rooted in 16 years of compliance expertise.
You know where it came from and how it works.

Precise

Auditable at every step. Built for
SEC and FINRA scrutiny. Stand behind it.

Built by people who have lived your jobs

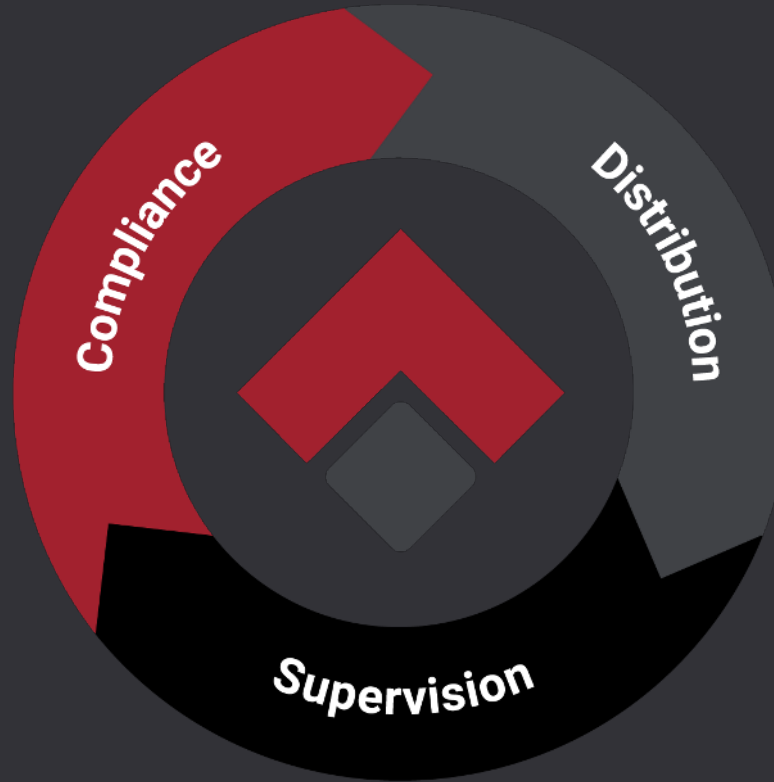
The Compliance Connectivity Platform

SPEED

Distributed content
in days, not weeks

REACH

Approved content to thousands
of advisors automatically



CONFIDENCE

Every channel, every communication, is
compliant and auditable

INSIGHT

becomes growth
intelligence

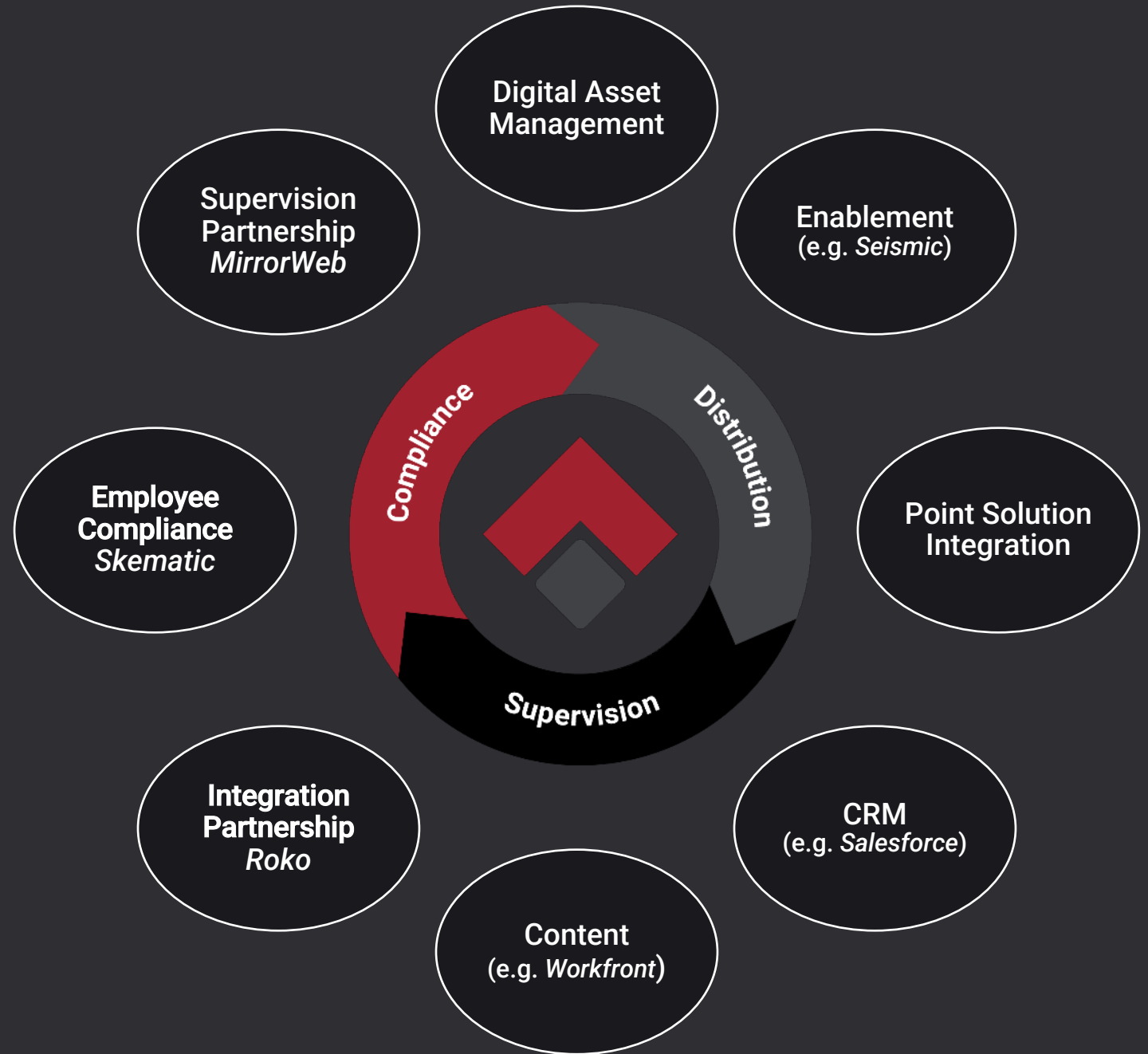
ACCELERATE 2026

Move faster - Stay compliant - Drive AUM.

***You might be surprised to find
that your colleagues are already
using this technology today.***

The Ecosystem

Red Oak is the
connective tissue.



AUSTIN, TX

- **Antone's + Terry Black's BBQ**

Tonight – Monday, April 20

- **Sunset Bat Cruise**

Tuesday, April 21 – Hosted by MirrorWeb

ACCELERATE 2026





Let's connect the dots

Welcome to Accelerate 2026



ACCELERATE 2026