



QUEST TRUST
C O M P A N Y

Quest Expo 2024

Irving Convention Center
Las Colinas, Texas

June 27-29, 2024

Rising to the Challenge

Thriving in Uncertain Economic Times

OPENING

27 Jun

Attendee Welcome Networking Reception

✓ **Sponsor Setup | 10am - 8:00pm**

No sponsor booths will be allowed to set up after 8pm.

✓ **Welcome Networking Reception | 4pm - 6pm**

Start off the event with a warm welcome at our lively opening reception!

Utilize the opportunity for early event check-in, connect with fellow attendees and exhibitors.

DAY 1

28 Jun

Event Begins & VIP Reception

✓ **Doors Open | 8am**

✓ **Event Sessions | 9am - 6:00pm**

Engage in insightful sessions and valuable networking opportunities that will fuel your growth and connections.

✓ **VIP Only Reception | 6:30pm - 9pm**

Join us for an exclusive VIP access only networking reception with free libations, food and live entertainment at The Ranch at Las Colinas!

DAY 2

29 Jun

Sessions Continue & Event Concludes

✓ **Doors Open | 8am**

✓ **Event Sessions | 9am - 5:15pm**

Engage in insightful sessions and valuable networking opportunities that will fuel your growth and connections.

✓ **Event Concludes!**



FRIDAY | JUNE 28

SPECIAL EVENTS

Exclusive VIP Reception
at The Ranch at Las Colinas
Friday from 6:30-9:00PM

Open Networking & Visit the
Vendors in Expo Exhibit Hall
Friday from 6:00-7:00PM

MAIN STAGE SESSIONS

8:00AM	Doors Open Check-in Begins
9:00 - 9:15AM	Event Begins - Welcome and Announcements Abhi Golhar, Event Emcee
9:15 - 9:30AM	Post Pandemic State of the Auto Industry - Buying/Selling/Investing What is the next generation of the auto industry? Is ordering customized cars the new normal? Kevin Gandhi, ZT Wealth
9:30 - 10:00AM	Top 3 Trends and Outlook on the Texas Real Estate Investment Market Review the current state of the Texas market and top trends for 2024 that should be on your radar. Kurt Carlton, New Western
10:00 - 10:45AM	Why Self-Storage Beats the Current Market Now and In the Future Self-storage can be resistant to recessions but also bounces back quicker than other asset classes. Learn about why this asset class has increased in popularity recently. Ryan Gibson, Spartan Investments
10:45 - 11:30AM	Morning Networking Break
11:30AM - 1:00PM	Capital Calls Anyone? Should I Be Worried About My Investment? Understanding capital calls - how they work, their risks, and the impact on the overall deal economics. Dan Handford, PassivelyInvesting.com
1:00-2:00PM	Lunch Break VIP Attendees to meet in VIP Room
2:10 - 2:45PM	Main Stage Surprise + Announcements Abhi Golhar, Event Emcee
2:45 - 3:45PM	Panel - Investing Smart: Leveraging Self-Directed IRAs and 401Ks Dive into advanced tax and legal topics as our panel discusses the pros and cons of different retirement accounts. Quincy Long, JP Ruiz, John Hyre, Adam Barr, Rob Anderson
3:45 - 4:30PM	Unlock the Wealth: Note Cycle Mastery Over Rental Market Uncertainties Navigate note investing like a pro and discover the benefits of lending during uncertain economic times. Eddie Speed, NoteSchool
4:30 - 5:15PM	The Healthcare Real Estate Boom: How to Maximize Profits with Doctor-Investor Partnerships Dr. Steven Kaufman, Zeus Companies
5:15 - 5:45PM	What's Behind the Single-Family Home Shortage? What is causing the shortage of single-family homes and strategies to invest in the current market. Bill Fairman, Carolina Capital
5:45 - 6:00PM	End of Day Announcements Abhi Golhar, Event Emcee

BREAKOUT SESSIONS | 4TH FLOOR

VIP ROOM | VIP ACCESS ONLY

10:15AM - 10:45AM
Top Methods Wealthy Use to Reduce Taxes, Protect Assets & Build Wealth
Learn strategies to keep your assets safe while building wealth from one of the nation's top asset protection advisors. - Don Pendleton

11:30AM - 12:15PM
Panel: Ask the Attorneys
Expert attorneys from different areas of legal will answer audience questions on topics ranging from estate planning, real estate, due diligence, Self-Directed IRAs and more.
Jeff Watson, John Hyre, Jasmin Dodson, Don Pendleton

12:15 - 12:45PM
Presentation: Estate Planning 101
Learn essential steps to protect your assets and leave a lasting legacy for your loved ones.
Jasmin Dodson

1:00PM - 2:00PM
Complimentary Lunch Exclusively for VIPs
Bonus Presentation: 8 Benefits of Passive Investing in Multifamily Properties - Arleen Garza
Lunch Sponsored by: REEP Equity

3:00PM - 3:30PM
Investing in the Top Recession-Resistant Niches in Texas Real Estate
Dr. Steven Kaufman, Zeus Companies

BREAKOUT ROOM 1

10:15AM - 10:45AM
Maximizing Returns with Smart Leverage in Real Estate Investing
Tim Herriage, Ternus

12:15 - 12:45PM
Thriving in Real Estate: Navigating Uncertain Times
If high interest rates and market uncertainty have you down, learn ways to adapt, survive, and thrive!
Liz Faircloth

3:15 - 4:00PM
Panel: The Emergence of Technology, Automation, and AI in Real Estate Investing
As technology changes every day, so is the way we do business. Our panel discusses the latest tools and how they can help you be more efficient.
Ryan Harper, Adonis Lockett, Chris Baker, Ivannia Recio

4:00 - 5:00PM
Panel: Women in Real Estate
Find your community of investors, gain tribal knowledge, and learn tips from women who have navigated many economic cycles.
Liz Faircloth, Shenoah Grove, Nancy Wallace-Laabs, Arleen Garza, Marci Surfas, Vivian Yip

BREAKOUT ROOM 2

11:30 - 12:15PM
Panel: Airbnb, VRBO and Short-Term and Mid-Term Rentals in 2024
Joining us with the same panel from the Quest Expo Houston 2022, we'll hear about the dramatic shifts in short term rentals, and city laws 18 months later.
Nancy Wallace-Laabs, Kristin Gerst, Wendy Sweet, Vivian Yip

12:15 - 1:00PM
Panel: Self-Storage
Our panelists discuss why this asset class continues to be a smart choice during economic downturns and its predicted outlook.
Ryan Gibson, Clint Harris, Anthony Deluca, Steve Davis

4:30 - 5:00PM
Commercial Real Estate: Trends Shaping the Market Today and for the Future
Dive into the current trends in commercial real estate and stay ahead of future trends.
Mike Zlotnik



QUEST
EXPO

SATURDAY | JUNE 29

MAIN STAGE SESSIONS

8:00AM Doors Open

9:00 - 9:15AM Event Begins - Announcements | Abhi Golhar, Event Emcee

9:15 - 10:45AM Using Debt and Equity Investments in Real Estate Like Stocks and Bonds
Investing in equity and debt has similar risk profiles and returns as investing in stocks and bonds. Learn how to do the proper due diligence so you can evaluate which option is best for you. | Tom Berry, Investor Loan Source

10:45 - 11:45AM Fueling Retirement Returns with Oil and Gas
Learn how oil and gas investments can balance your portfolio and provide a consistent cash flow with reduced risk. Troy Eckard, Eckard Enterprises

11:45AM - 12:30PM Panel - Ignore the Noise: Why Multifamily Still Makes Sense in a Down Market
Hear from the experts why multifamily is still a stable investment during economic downturns. Jacob Garza, Brad Sumrok, Dan Handford, Feras Moussa, Dustin Heiner, Shawn Griffith

12:30-1:15PM Investing in Real Estate with Debt Funds: The Best Kept Secret
Learn the best kept secret in real estate investing - how to make money selling money and do it for a fraction of the time and effort. | Adonis Lockett, LNH Capital

1:15 - 2:15PM Lunch Break | VIP Attendees to meet in VIP Room

2:15 - 3:00PM Inflection Point: Interest Rates, Elections, and the Real Estate Landscape
With so many factors out of our control, we'll look at the impact these factors are having on the current landscape and how to find success in this environment. | Spencer Staples, PPR Capital Management

3:00 - 3:30PM Transformational Real Estate Investing
Unlock the secrets to early retirement through single-family and multifamily real estate investments. Build a sustainable income stream by adopting the mindset and strategies of successful investors. | Trey Stone, Equity Academy

3:30 - 4:15PM Panel - Strategic Insights into Note Investing
Our expert panel will tackle the ins and outs of note investing and strategies for success. Dan Zitofsky, Eddie Speed, Joshua Andrews, Chihiro Kurokawa, Spencer Staples

4:15- 4:45PM Don't Hide the Dynamite - Generational Wealth is Much More than Money
Leaving a legacy for your family takes planning. Learn how IRAs are best used for transferring capital. Dr. David Phelps, Freedom Founders

4:45 - 5:00PM Post Pandemic State of the Healthcare Industry
Educating the public on emergent care facilities, impact of Covid on the healthcare industry, history in healthcare and footprint in Texas. | Azhar Hirani, ZT Wealth

5:00 - 5:15PM End of Event Announcements | Abhi Golhar, Event Emcee

BREAKOUT SESSIONS | 4TH FLOOR

VIP ROOM | VIP ACCESS ONLY

10:00AM - 10:30AM

Retire Rich Through Real Estate Rentals
Southern Impression Homes takes owning rental property to the next level with their innovative 2.0 approach, focusing solely on new construction investment properties, single family homes, duplexes and quads. Jim Sheils - Southern Impression Homes

11:30AM - 12:15PM

Overlooked Essentials with Self-Directed IRA Lending
Think you have lending with your SDIRA all figured out? Learn some important items you may have missed. Jeff Watson

12:15 - 1:00PM

Converting Traditional to Roth at a Discount (Big Savings) and Check Book LLC Issues (Danger!)
Dig deeper into advanced tax topics including check book control and what financial dangers it poses if you do not understand the rules. John Hyre

1:15PM - 2:15PM

Complimentary Lunch Exclusively for VIPs
Bonus Presentation: Invest in the Texas Housing Shortage
Rob Anderson
Lunch Sponsored by: BV Capital

BREAKOUT ROOM 1

11:00AM - 11:15AM

Build to Rent Developments as an Alternative to Multifamily Investments
Tauheed Siddiqui, TAAS

11:30 - 12:00PM

How to Raise Private Money Without Asking for Money
Finding money for your deal is easier than you think. An essential class for anyone with a deal looking for investors. Jay Conner

12:00 - 12:30PM

Building Wealth and a Second Stream of Income with Real Estate
Retiring by age 65 usually requires a second stream of income. Learn how to build wealth and a second stream of income investing in apartments, self-storage, senior living, strip shopping centers, and more. Steve Davis

12:30 - 1:00PM

Self-Administered Solo 401k Plans for Solopreneurs
Discover how the Solo 401k can provide freedom and flexibility to entrepreneurs saving for retirement. JP Ruiz

BREAKOUT ROOM 2

9:40 - 10:00AM

Case Study: Tax Deed Properties
We'll walk you through the process investing in tax deed properties. John Berlet

10:00 - 10:45AM

Panel Medical to Entrepreneurs / Investors
Investors from the medical field discuss how they have achieved greater financial independence through alternative investing. David Phelps, Dan Handford, Amir Baluch, Jack Mize

11:00AM - 11:15AM

Keynote Presentation
Jeff King - Ramey King Insurance

SPECIAL EVENTS

Open Networking in Expo Exhibit Hall
Saturday from 5:00-6:00PM



2024 EVENT SPONSORS

INVESTOR LOAN SOURCE
PASSIVEINVESTING.COM
ECKARD ENTERPRISES
ZEUS HEALTHCARE

NOTESCHOOL
SPARTAN INVESTMENT GROUP
PPR CAPITAL
LNH CAPITAL

CQ SERVICING | SOUTHERN IMPRESSION HOMES
REEP EQUITY | TEMPO FUNDING
BV CAPITAL | ZT CORPORATE
CMI MORTGAGE INVESTMENTS | EQUITY ACADEMY

THE OWNER FINANCE NETWORK	SUMROK MULTIFAMILY MENTORING
7E INVESTMENTS	TAAS INVESTMENTS
BEST REI FUNDING	CORE TAX DEEDS
TOTAL WEALTH ACADEMY	CORNERSTONE CAPITAL INVESTMENTS
LISTINGSPARK	CRAFT CAPITAL INVESTMENTS
HEDGEHOG INVESTMENTS	KIND COMMERCIAL FUND
CAROLINA CAPITAL MANAGEMENT, LLC	STORAGE UNITS EQUITY INCOME FUND, LLC
THE REAL ESTATE INVESTHER	NOVAK CAPITAL
FIVE BUFFALO CAPITAL, LLC	SECURED INVESTMENT CORP
BOOMERANG CAPITAL PARTNERS	JET LENDING, LLC
ALLIED SERVICING CORPORATION	DAKOTA PROPERTIES, LLC
NOMAD CAPITAL	TERNUS LENDING, LLC
BLACK LABEL CAPITAL	BP FAST LENDING
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INTELLIGENT CRANIUM HELMETS	MASTER PASSIVE INCOME
CITY FUNDS	TM2SQUARED INC
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