



Spring 2024 Agenda

1:00-1:30 p.m.	Arrivals, registration and networking	
1:30 - 1:45 p.m.	The wealth (r)evolution Five trends that will drive the industry today, tomorrow, and in the future.	Managing Director, SEI
1:45-2:30 p.m.	Investments: A critical competitive advantage A deep dive into SEI's investment philosophy, process, and resources that support the approach.	Portfolio Advisory Team, SEI
2:30-3:30 p.m.	Panel discussion: Defining the 2024 market and potential investor trends	Portfolio Advisory Team, SEI Capital Group® City National Rochdale Dimensional Fund Advisors
3:30-4:15 p.m.	How SEI helps fuel growth: Tax-management, business transitions, and practice management	Business Development Manager, SEI
4:15-4:30 p.m.	Powering wealth: Technology tools Experience how our flexible integrated and easy-to-use technology connects you to your business and your clients.	Business Development Director, SEI
4:30 p.m.	Happy hour, hors d'oeuvres and networking	