Discovery Forum

Agenda

Wednesday, October 29

SESSION	DESCRIPTION	SPEAKER
2:00 – 2:05 p.m.	**Welcome and introductions**	Chris Arizin, Managing Director, Sales and Experience
2:05 – 3:00 p.m.	**The change (r)evolution:** Key trends driving a revolution in wealth management	Erich Holland, Head of Sales and Experience
3:00 – 3:30 p.m.	**Discover SEI:** Get to know how SEI can help you control your business, empower your confidence, and fuel your conviction in the impact you make to clients	Chris Arizin, Managing Director, Sales and Experience
3:30 – 4:30 p.m.	**Advisor panel:** Gain insights from advisors as you learn about their experiences in the industry and how SEI's solutions and services have impacted their business	Moderated by: Shauna Mace, CHPC, Head of Practice Management
4:30 – 4:45 p.m.	**Wrap up and housekeeping**	Chris Arizin, Managing Director, Sales and Experience
4:45 – 7:00 p.m.	**Evening reception and kiosks:** Get to know the team that supports you and your business, and network with your peers. SEI technology and strategist partners' kiosks available	Digital account open & Proposal builder Investor portal & Advisor experience Digital model management & trading Personal Trust Services City National Rochdale® Capital Group | American Funds® Dimensional Fund Advisors Nationwide Smart Credit The Bancorp™ Global X

Thursday, October 30

SESSION	DESCRIPTION	SPEAKER
7:00 – 8:00 a.m.	**Breakfast**	
8:00 – 8:10 a.m.	**Welcome**	Chris Arizin, Managing Director, Sales and Experience
8:10 – 9:00 a.m.	**Getting candid**: A conversation with our leaders about the evolution of SEI and future of the advisor business	Moderated by: Erich Holland, Head of Sales and Experience
9:00 – 9:45 a.m.	**Our investment philosophy**: Rooted in advice, customization, and stability, a view into what makes SEI investment approach different	Jim Smigiel, Chief Investment Officer, Head of SEI's Investment Management Unit
9:45 – 10:15 a.m.	**Breaks and kiosks**	
10:15 – 11:00 a.m.	**Investment solutions:** A deep dive into investment strategies designed to put you in control	Tim Gregory, Director of Portfolio Advisory Services
11:00 – 11:45 a.m.	**Bringing our investment solutions to life:** Case studies and implementation ideas	Bill Berberich, Business Development Manager Tim Gregory, Director of Portfolio Advisory Services
11:45 a.m. – 12:45 p.m.	**Lunch and kiosks**	
12:45 – 1:15 p.m.	**Advisor firm services:** Practice management content and tools you can leverage today	Stephanie Reilly, Practice Management Business Consultant
1:15 – 2:00 p.m.	**Technology tools:** Connecting you and your business with flexible, easy-to-use tools	Arthur Worthington, Business Development Director
2:00 – 2:30 p.m.	**The power of SEI enterprise solutions:** Experience everything you have access to that can bolster your business and impact more clients	Gabe Garcia, Managing Director, RIA Sales and Experience
2:30 p.m.	**Thank you and departures**	Chris Arizin, Managing Director, Sales and Experience