

# Agenda



## Tuesday, May 12

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**2:00 – 2:30 p.m.**     **Welcome and 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.

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**2:30 – 3:00 p.m.**     **The trust multiplier:** We'll highlight how simplifying the complex can be a catalyst for deeper relationships, better decision-making, and enduring trust.

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**3:00 – 3:45 p.m.**     **Our investment philosophy:** Rooted in advice, customization, and stability, a view into what makes SEI's investment approach different.

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**3:45– 4:00 p.m.**     **Break**

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**4:00 – 5:00 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.

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**5:00 p.m.**     **Wrap up and partner highlights**

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**5:00 – 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.

SEI Technology and Solutions  
City National Rochdale®  
Capital Group | American Funds®  
Dimensional Fund Advisors  
Nationwide Smart Credit  
The Bancorp™

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## Wednesday, May 13

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7:00 – 8:00 a.m.

**Breakfast**

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8:00 – 8:10 a.m.

**Welcome**

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8:10 – 9:00 a.m.

**Getting candid:** A conversation with our leaders about the evolution of SEI and future of the advisor business.

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9:00 – 9:45 a.m.

**Investment solutions:** A deep dive into investment strategies designed to put you in control.

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9:45 – 10:15 a.m.

**Break and kiosks**

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10:15 – 10:45 a.m.

**Bringing our investment solutions to life:** Case studies and implementation ideas.

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10:45 – 11:30 a.m.

**Bringing our technology solutions to life:** Connecting you and your business with flexible, easy-to-use tools.

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11:30 a.m. – 12:30 p.m.

**Lunch and kiosks**

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12:30 – 1:15 p.m.

**Is your business S.E.T.?** Ongoing consolidation has created significant challenges. Learn how enterprise value is optimized when an advisory business is Sustainable, Enhanceable, and Transferable.

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1:15 – 1:45 p.m.

**Business transitions:** Discover how a well-planned transition can strengthen client relationships.

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1:45 – 2:00 p.m.

**Thank you and departures**

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