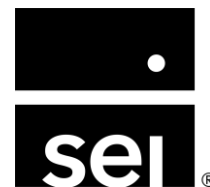


Agenda



Wednesday, November 4

1:00 – 2:00 p.m. **Arrivals and campus tour**

2:00 – 2:30 p.m. **The fifth act of advice:** How advisors endure in an AI native future.

2:30 – 3:00 p.m. **Discover SEI:** Get to know how we can help you control your business, empower your confidence, and fuel your conviction in the impact you make to clients.

3:00 – 3:45 p.m. **Market outlook:** What's happening in the market and what's driving it.

Our investment philosophy: Rooted in advice, customization, and stability, a view into what makes SEI's investment approach different.

3:45 – 4:00 p.m. **Break**

4:00 – 4:30 p.m. **Building your ideal firm:** Plan for what's next and how to get there.

4:30 – 5:30 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.

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

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
Advanced Planning and Personal Trust Services
SEI Access®
RBC Rochdale®
Capital Group®
Dimensional Fund Advisors
Nationwide Smart CreditSM
The BancorpTM

Thursday, November 5

7:30 – 8:30 a.m.	Breakfast
8:30 – 8:40 a.m.	Welcome
8:40 – 9:30 a.m.	Getting candid: A conversation with our leaders about the evolution of SEI and future of the advisor business.
9:30 – 10:15 a.m.	Bringing our technology solutions to life: Connecting you and your business with flexible, easy-to-use tools.
10:15 – 11:00 a.m.	Break, kiosks and demos
11:00 – 11:45 a.m.	Investment solutions: A deep dive into investment strategies designed to put you in control.
11:45 – 12:30 p.m.	Bringing our investment solutions to life: Case studies and implementation ideas.
12:30 – 1:15 p.m.	Lunch, networking, and demos
1:15 – 1:55 p.m.	Build for what's next Grow, scale, and adapt: Learn how thoughtful firm design, enterprise value drivers, and proactive support can help you stay flexible as your business evolves.
1:55 – 2:00 p.m.	Thank you and departures