

Agenda



Wednesday, September 9

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

2:00 – 2:30 p.m. **The trust multiplier:** A look at the industry trends shaping wealth management and how trust, advice, and new technologies are helping firms build capacity. Shauna Mace, CHPC™, Head of Practice Management

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. Steve Miller, CFP®, Managing Director, New Client Team

3:00 – 3:45 p.m. **Market outlook:** What’s happening in the market and what’s driving it. Jim Smigiel, Chief Investment Officer, Head of SEI’s Investment Management Unit
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 – 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. Moderated by: Steve Miller, CFP®

5:00 p.m. **Wrap up and partner highlights** Steve Miller, CFP®, Managing Director, New Client Team

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 Bancorp™

Thursday, September 10

7:30 – 8:30 a.m.	Breakfast	
8:30 – 8:40 a.m.	Welcome	Gabe Garcia, Head of RIA Client Strategy and Experience
8:40 – 9:30 a.m.	Getting candid: A conversation with our leaders about the evolution of SEI and future of the advisor business.	Moderated by: Gabe Garcia Ryan Hicke, CEO Erich Holland, Head of Wealth Advisor Client Team
9:30 – 10:15 a.m.	Bringing our technology solutions to life: Connecting you and your business with flexible, easy-to-use tools.	Alex DeCiantis, CFP®, Business Development Director
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.	Tim Gregory, Director of Portfolio Advisory Services
11:45 – 12:30 p.m.	Bringing our investment solutions to life: Case studies and implementation ideas.	Bill Berberich, CFP®, Senior Relationship Manager
12:30 – 1:15 p.m.	Lunch and networking	
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.	Shauna Mace, CHPC™, Head of Practice Management Chris Rice, Head of Client Enablement and Analytics
1:55 – 2:00 p.m.	Thank you and departures	Steve Miller, CFP®, Managing Director, New Client Team
