

Conference Registration

Fee

Registration fee for each attendee is \$2,100, which includes:

- Two days of educational sessions
- All conference materials
- Meals during conference sessions
 - Welcome Reception on Thursday
 - Breakfast, lunch and dinner on Friday
 - Breakfast on Saturday
 - Breaks during Sessions

Guests

Guests of the registrants are welcome to join both the conference welcome reception on Thursday and dinner on Friday, subject to a separate attendance fee of \$200 per person. This guest fee is also intended to satisfy the requirements for those subject to LM30 and LM10 reporting.

How to register

Conference registrations may be submitted through your respective Administrator/Manager/ Director (Administrator). However, you may also register directly if your organization does not utilize an Administrator. Please complete the Registration Form that can be found at:

www.segalmarco.com/2024-client-conference

Please provide:

- Your arrival and departure dates to secure your hotel room
- Your attendance to meals to acquire a proper guest count



Segal Marco Advisors' 2024 Client Conference

Join us in the Sunshine State to shed light on your investments and the markets

October 24-26, 2024

**The Vinoy Resort & Golf Club,
An Autograph Collection**
501 5th Avenue, NE
St. Petersburg, FL 33701

Segal Marco Advisors

Segal Marco Advisors is a leading, independent investment solutions firm serving over 400 clients with combined advisory assets of approximately \$600 billion. Our expertise, research and technology help clients build a sound investment program that will give their plan participants dignity and comfort in retirement.

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 Segal Marco Advisors

You are Invited

Segal Marco Advisors is pleased to invite you to our 2024 client conference at The Vinoy Resort & Golf Club, An Autograph Collection from Thursday, October 24 to Saturday, October 26, 2024. As a participant, you will have the opportunity to:

- Attend presentations on the latest trends and education session on investing,
- Discuss key issues and challenges with Segal Marco experts from research and consulting, and
- Participate in planned evening events to network with your peers outside of the meeting room.

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Dress and Weather

The attire during the conference is resort casual. We suggest you bring a lightweight jacket/sweater, as it may be cool in the evening. The average temperature in October is 84°/70°.



Agenda

Thursday, October 24

4–6 pm	Registration & Welcome Cocktail Reception
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Friday, October 25

7 am–3 pm	Registration
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7–8 am	Breakfast
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8 am–3 pm	General sessions and lunch Topics to include: <ul style="list-style-type: none">• State of the markets• Artificial Intelligence: How to think about the opportunity and what does it mean for your portfolio?• What should we expect from real estate?• Fixed Income: Role in portfolio and update on current state• Private markets update• With higher interest rates, how should a Sponsor think about spending formulas policy, cash flow and liquidity in managing portfolio structure and asset allocation.
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6–9 pm	Cocktail Reception and Dinner
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Saturday, October 26

7–8 am	Breakfast
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8–11:15 am	General Sessions & Roundtables Topics to include: <ul style="list-style-type: none">• Demographics and impacts on global trend and managing your business and investments• What you should know about discretionary management• Trends and updates on investments, regulations and legislation impacting both participants and plan sponsors
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Hotel Information

Our 2024 client conference will be held at The Vinoy Resort & Golf Club, An Autograph Collection located at 501 5th Avenue, NE, St. Petersburg, Florida 33701. Built in 1925, this pink landmark resort and spa is an historic Mediterranean Revival-style hotel, located on the bayfront area of downtown St. Petersburg, overlooking the Vinoy Yacht Basin and a mile from both the St. Petersburg Pier and The Dali Museum.

Hotel reservations

We have secured a group room rate of \$404 per night plus a reduced resort fee of \$24, which includes:

- Daily standard high-speed internet access in guest room
- Access to Wellness Classes, one hour, limit 2 persons per day
- Access to Fitness Classes and use of all equipment, limit 2 persons per day
- Access to Tennis Courts, including rackets and balls per day, 90 minutes, limit 2 persons per day
- Two complimentary specialty cocktails per stay at either the Veranda or Paul's Landing
- E-Bike rentals, one-hour rentals per day, based on availability, limit 2 persons per day
- Two St. Petersburg History Museum Tickets per stay

Hotel room rates are subject to applicable state and local taxes, currently 13% at the time of checkout. The rate is available for the main nights of our event and will be offered three (3) days pre- and post-, based on hotel availability. Hotel costs are separate from the conference registration fee.

Hotel reservations must be made by completing the Hotel Reservation Section of the Registration Form. Segal Marco will guarantee your reservation. However, should an attendee cancel a hotel reservation, cancellation fees assessed in accordance with the general policy of the hotel at that time are the attendees' responsibility.