

Segal Marco Advisors' 2026 Client Conference

Agenda

Investing in the Future: The Innovation Journey

Join us in this journey through the evolving landscape of finance, technology and global markets. Each session represents a destination on this journey, with interactive elements and touches to make learning and networking memorable.



Thursday, March 12

4–6 pm

Basecamp Check-in: Welcome to the Trailhead



Friday, March 13

7 am–2 pm

Trailhead Office: Registration

7–8 am

The First Ascent Breakfast

8–8:30 am

The Journey Begins

Our journey begins with a look back at where we've been and a plan for where we're going.

8:35–9:15 am

Charting the Landscape

Our first steps on this journey will be to chart the state of the markets landscape behind us and the horizon before us.

9:20–10:20 am

The Tech Trek

We see and hear the term "AI" every day. Let's trek through the wilds of artificial intelligence – exploring the dynamic and evolving environment.

10:20–10:35 am

Carb Load for the Hike Ahead



- 10:35–11:05 am **Adding Tools to Your Pack for the Hike**
 In today's higher inflation environment, building a resilient investment portfolio is like packing for a challenging hike. Just as crucial gear provides stability and ensures consistent progress on the trail, we will discuss how investing in hard asset classes adds structural components, to provide a sturdier financial journey.
- 11:10–11:40 am **Your Sturdy Campsite**
 Like a safe haven providing shelter, we will review how to structure fixed income portfolios strategies, designed to provide safety and stability should an economic storm hit.
- 11:45 am–12:15 pm **Trust the Path**
 Even if things get rocky, trusting the path will guide us through the equity market as they continue to be the core allocation of Plans. We will explore how our existing roadmap can get us to our destination and how we can seek out new paths to adjust to a changing terrain.
- 12:15–1:45 pm **The Geopolitical Summit Briefing**
 Over lunch, our guest speaker will set the table by reviewing the geopolitical landscape, the global outlook and the divergent paths of global economies.
- 6–8 pm Checkpoint Social

Saturday, March 14



- 7:30–8:30 am Fueling the Journey
- 8:30–9:15 am **The Trail of Innovation**
 As we advance into the future, our next major expedition will be exploring the opportunities within the uncharted digital wilderness – the new gold rush called crypto.
- 9:20–10:05 am **New Landscapes**
 Let's take a fresh look at paths less travelled as we review private equity, private credit and opportunistic strategies in building portfolios.
- 10:05–10:15 am Refuel Station



10:15–11:00 am

The Pathfinders

Like Pathfinders, we rely on our discretionary team to safely navigate rapidly changing conditions, using critical thinking, specialized tools and intelligence to navigate cash flow, liabilities and opportunities in managing client portfolios.



11 am–12:15 pm

Reaching the Strategic Summit: Real-Time Strategy Education

As we reach the summit, our consulting team will share real-time, actionable insights to the topics we have discussed.



6–10 pm

The Trail Ends Here with Cocktails & Dinner



Sunday, March 15

8–9 am

Morning Provisions

9–10 am

On the AI Trail: A Journey of Discovery and Challenge

As we look down the road to future journeys of discovery, we will look in-depth at the risks and opportunities in AI.

10–11:30 am

Around the Campfire: Roundtable Discussions

Come to the campfire for a series of in-depth roundtables, where each table will share insights and strategies exploring distinct asset classes and portfolio solutions.

