

Discovery Forum.



Agenda

Tuesday, April 29

SESSION	DESCRIPTION	SPEAKER
2:00 – 2:05 p.m.	Welcome and introductions	Frank Byrd, Managing Director, Sales and Experience
2:05 – 3:00 p.m.	The change (r)evolution: Key trends driving a revolution in wealth management	Erich Holland, Head of Sales and Experience
3:00 – 3:30 p.m.	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.	Frank Byrd, Managing Director, Sales and Experience
3:30 – 4:30 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.	Moderated by: Shauna Mace, Head of Practice Management
4:30 p.m.	Wrap up and housekeeping	Frank Byrd, Managing Director, Sales and Experience
4:45 p.m – 7:00 p.m.	Evening reception	

Wednesday, April 30

SESSION	DESCRIPTION	SPEAKER
8:00 – 8:10 am	Welcome	Frank Byrd, Managing Director, Sales and Experience
8:10 – 9:00 a.m.	Getting candid: A conversation with our leaders about the evolution of SEI and future of the advisor business.	Moderated by: Erich Holland, Head of Sales and Experience
9:00 – 9:45 a.m.	Our investment philosophy: Rooted in advice, customization, and stability, a view into what makes SEI investment approach different	Jim Smigiel, Chief Investment Officer, Head of SEI's Investment Management Unit
9:45 – 10:15 a.m.	Breaks and kiosks	
10:15 – 11:00 a.m.	Investment solutions: A deep dive into investment strategies designed to put you in control	Tim Gregory, Director of Portfolio Advisory Services
11:00 – 11:45 a.m.	Bringing our investment solutions to life: Case studies and implementation ideas	Rob Kelly, Business Development Manager
11:45 – 12:45 p.m.	Lunch and kiosks	
12:45 – 1:15 p.m.	Advisor firm services: Practice management content and tools you can leverage today	Shauna Mace, Head of Practice Management
1:15 – 2:00 p.m.	Technology tools: Connecting you and your business with flexible, easy to use tools	Arthur Worthington, Business Development Director
2:00 – 2:30 p.m.	The power of SEI enterprise solutions: Experience everything you have access to that can bolster your business and impact more clients	Gabe Garcia, Managing Director, RIA Sales and Experience
2:30 p.m.	Thank you and departures	Frank Byrd, Managing Director, Sales and Experience