

# West Coast Partner Conference

## AGENDA



### February 8th & 9th, 2023

Wednesday, February 8th | 6:00 p.m. to 10:00 p.m.

**6:00 pm**    **Cocktails & Dinner**

Thursday, February 9th | 8:00 a.m. to 3:05 p.m.

**8:00 am**    **Breakfast**

**9:00 am**    **Welcome and Introductions**  
Zack Dukich, SVP, Divisional Sales Manager

**9:15 am**    **Clark Capital's Investment Philosophy & Market Outlook**  
*Approved for 1 Hour of CFP® CE*  
K. Sean Clark, CFA®, Chief Investment Officer, Clark Capital

**10:15 am**    **Break**

**10:30 am**    **A Conversation with Our Portfolio Managers**  
Moderated by Brett McAvoy, Investment Consultant  
**Equity Panel**  
Sean Clark, CFA®, Maira Thompson, and Tony Soslow, CFA®  
**Fixed Income Panel**  
Jon Fiebach and Neal DeBonte

**12:00 pm**    **Lunch with Executives & Portfolio Managers**

**1:00 pm**    **Tools to Attract and Retain HNW Clients**  
**Income Planning**  
Kade Vasi, CPWA®, CIMA®, Investment Consultant  
**Client Portfolio Management Services**  
Pete Eisenrich, CFA®, VP, Senior Client Portfolio Manager

**1:45 pm**    **Partner Panel: Hear from Your Peers**  
Moderated by Mike Wade, Investment Consultant

**2:30 pm**    **Tying It All Together**  
Chris Cullen, CIMA®, EVP, Chief Distribution Officer

**3:00 pm**    **Closing Remarks**  
Zack Dukich, SVP, Divisional Sales Manager

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