West Coast Partner Conference



February 8th & 9th, 2023

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

6:00 pm **Cocktails & Dinner**

House of Blues Las Vegas

Thursday, February 9th	18:00 am to 2:15 nm
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Closing Remarks

3:15 pm

Thursday, February 9th 8:00 a.m. to 3:15 p.m.			
	8:00 am	Breakfast	
	9:00 am	Welcome and Introductions Zack Dukich, SVP, Divisional Sales Manager	
CE CREDIT	9:15 am	Clark Capital's Investment Philosophy & Market Outlook Approved for 1 Hour of CFP® CE Sean Clark, CFA®, Chief Investment Officer	
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 Oliver Chambers	
	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 Anthony Graves, Investment Consultant	
	2:30 pm	KEYNOTE: The Human Experience of Money Chris Cullen, CIMA®, EVP, Chief Distribution Officer Neil Bage, Co-Founder, Shaping Wealth	

Zack Dukich, SVP, Divisional Sales Manager

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KEYNOTE

The Human Experience of Money

Navigating a noisy and modern world is both relentless and overwhelming. Stress levels are on the rise, fueled by an always-on society that demands our attention and our time. And yet, it's within this framework that we ask our clients to make important financial decisions. In this thought-provoking talk, applied neuroscience expert and advisor coach Neil Bage will discuss the crucial role advisors play in helping clients make great financial decisions and live a meaningful and purposeful life.

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