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 | 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
3:15 pm	**Closing Remarks** 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.