SYMMETRY®

# ADVISORFEST

**EXPERIENCE • GROWTH • TRANSFORMATION**

A virtual event for independent Advisors focused on successful strategies and solutions for delivering a better client experience and growing your practice. Sessions will focus on Earning Referrals, Timely Digital Marketing, New Developments in Evidence-Based Investing, the Best Practices of Successful Advisors, and more.

JUNE 22 • 23 • 24

**LEARN MORE**

## June 22 | EXPERIENCE

**Session 1 - 11 AM ET**

### Invested in Your Goals (CE Credit)

Learn how to explain your value as a financial advisor to clients as well as the fundamentals of financial planning and Evidence-Based investing.

Presenter:

**Mike Storer**
Senior Regional Director

**Session 2 - 3 PM ET**

### Creating a More Scalable Business

Learn how to structure your business so you can spend less time on running the business and more time working with clients and growing.

Presenter:

**Jim Tavares**
Regional Director

## June 23 | GROWTH

**Session 1 - 11 AM ET**

### New Trends in Evidence-Based Investing

Symmetry's Research Team focuses on the latest research around Evidence-Based investing, including the expected resurgence of Small and Value and how to think about—and implement--diversified portfolios successfully.

Presenters:

**Philip R. McDonald, CFA, CAIA, CIPM**
Managing Director

**Casey Dylan, CIMA®**
Director of Investment Communications

**Session 2 - 3 PM ET**

### Mastering Digital Marketing

In this session, we will show you step-by-step how to create successful digital campaigns that can generate leads, nurture prospects, and build deeper relationships with existing clients.

Presenters:

**J. William G. Chettle**
Director of Experience & Engagement

**Andrea Loin**
Digital Marketing Specialist

## June 24 | TRANSFORMATION

**Session 1 - 11 AM ET**

### Building a More Referable Business

Taking an evidence-based approach, Symmetry's Director of Experience & Engagement, J. William G. Chettle, will walk you through a strategic approach to earn more referrals from clients and COIs and increase the likelihood of these referrals deciding to work with you.

Presenter:

**J. William G. Chettle**
Director of Experience & Engagement

**Session 2 - 3 PM ET**

### Advisor Panel: How to Grow Your Business Today

Three experienced Financial Advisors will discuss how they are succeeding right now, including bringing on new clients, earning more referrals, and delivering a better client experience.

Moderators:

**Tom Romano**
Director, National Sales

**JT Lavery**
Associate Director, National Sales