

## SYMMETRY SUMMIT CONFERENCE

November 9 – 10, 2022

*Perspective on Symmetry's Investments Philosophy, Solutions & Resources for Advisors*

### Wednesday, November 9

Morning                      Optional meetings with Symmetry Team members and office tours

12:00 pm - 1:00 pm      Lunch

1:00 pm – 1:45 pm      Symmetry & The Future of Advice

*David Connelly, Symmetry Co-founder & Principal*

1:45 pm – 2:45 pm      Symmetry Research – New Insights & Initiatives

*John B. McDermott, Ph.D., Chief Investment Strategist, Symmetry Partners*

2:45 pm – 3:00 pm      Break

3:00 pm – 4:30 pm      60 / 40 and Beyond: Axiom, Tax Alpha Program, Dynamic Risk Management

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

*Tom Romano, Head of Strategic Relationships & Product Development, Symmetry Partners*

4:30 pm – 5:30 pm      Growing Your Business Today

*Moderated by James Lavery, Associate Director, National Sales, Symmetry Partners*

*Three Financial Advisors*

5:30 pm                      Reception & Dinner

The Beamhouse Restaurant

*Sponsored by Dimensional Fund Advisors*

Thursday, November 10

- 8:00 am – 8:30 am      Breakfast
- 8:30 am – 9:30 am      Money Manager Insights  
*Dimensional Fund Advisors & AQR Capital Management*
- 9:30 am - 10:30 am      Taxes & Your Practice Panel  
*Moderated by Tom Romano, Head of Strategic Relationships & Product Development, Symmetry Partners*  
*Two Financial Advisors*
- 10:30 am – 10:45 am      Break
- 10:45 am – 11:45am      Keynote Presentation – Delivering a Better Client Experience  
*Greg Menefee, SVP, Consulting & Implementation, Orion Advisor Technology*
- 11:45 am – 12:00 pm      Morning Wrap Up
- 12:00 pm – 2:00 pm      Lunch and Solutions Fair
- 2:00 pm – 3:15 pm      Creating Your 2023 Growth Plan  
*Andrea Loin, Associate Director, Marketing, Symmetry Partners*  
*Symmetry Regional Director*
- 3:15 pm – 3:30 pm      Break
- 3:30 pm – 4:30pm      Creating a More Referrable Business  
*William Chettle, Head of Client Experience & Advisor Services, Symmetry Partners*
- 4:30 pm – 7:30 pm      Optional Reception & Dinner  
151 National Drive  
*Sponsored by AQR Capital Management*