

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 State of the Firm

David Connelly, Symmetry Co-founder & Principal

1:45 pm – 2:45 pm New Trends in Evidence-Based Investing

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

Symmetry Regional Director

2:45 pm – 3:00 pm Break

3:00 pm – 4:30 pm Symmetry Axiom

Symmetry Research & Sales

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

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

Two Financial Advisors

5:30 pm Reception & Dinner

The Beamhouse Restaurant

Sponsored by Dimensional Fund Advisors

Thursday, November 10

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| 8:00 am – 8:30 am | Breakfast |
| 8:30 am – 9:30 am | Money Manager Presentations <i>Dimensional Fund Advisors & AQR Capital Management</i> |
| 9:30 am - 10:30 am | Taxes & Your Practice Panel <i>Moderated by Tom Romano, Head of Strategic Relationships & Product Development, Symmetry Partners</i> <i>Two Financial Advisors</i> |
| 10:30 am – 10:45 am | Break |
| 10:45 am – 11:45am | Keynote Presentation – Delivering a Better Client Experience <i>Greg Menefee, SVP, Consulting & Implementation</i> <i>Orion Advisor Technology</i> |
| 11:45 am – 12:00 pm | Wrap Up for the morning |
| 12:00 pm – 2:00 pm | Lunch and Solutions Fair |
| 2:00 pm – 3:15 pm | Creating Your Growth Plan <i>Andrea Loin, Associate Director, Marketing, Symmetry Partners</i> <i>Symmetry Regional Director</i> |
| 3:15 pm – 3:30 pm | Break |
| 3:30 pm – 4:30pm | Creating a More Referrable Business <i>William Chettle, Head of Client Experience & Advisor Services, Symmetry Partners</i> |
| 4:30 pm – 6:30 pm | Optional Reception & Dinner 151 National Drive Sponsored by AQR Capital Management |