

Financial & Investment Roundtable



March 18–21, 2018

THE CLOISTER AT SEA ISLAND
Sea Island, GA

SPOUSE/GUEST PROGRAM

SUNDAY, MARCH 18

4:00–5:30 PM

REGISTRATION – *Georgian Room Library*

5:30–6:30 PM

WELCOME RECEPTION – *Black Banks Terrace (Rain location: Spanish Lounge)*

Join attendees for networking and cocktails.

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MONDAY, MARCH 19

7:00 AM–5:00 PM

REGISTRATION – *Cloister Foyer II*

7:00–8:00 AM

NETWORKING BREAKFAST - *Black Banks Terrace (Rain location: Mizner Ballroom)*

Join attendees for breakfast.

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8:45 – 10:45 AM

***OPTIONAL EVENT: WILDLIFE AND HISTORY BIKE TOUR**

Pre-registration required. Please meet at hotel lobby at 8:30 AM.

Join a naturalist for a biking tour of Sea Island. Enjoy the marsh and beach views while discovering its wildlife, homes, and history. Tour stops at a few different locations as you bike north on the island. **First stop:** beautiful saltmarsh overlook, where we discuss the importance of several different plants, birds, and other wildlife. **Second stop:** the beach where we discuss the important aspects of Georgia's coastline, the sea turtle nesting work we do, and several other things regarding the plant and wildlife biology of the beach ecosystem. Guests will discover the first four homes ever built on Sea Island, the most eclectic, modern home on Sea Island as well as the oldest, most beautiful magnolia tree. We are naturalists, after all!



12:15–1:45 PM

LUNCH SESSION - *Mizner Ballroom*

Join attendees for lunch.

Trends Transforming Tomorrow

As a futurist, **Jack Uldrich** is frequently asked, "What will the future look like?" And his response is: "Predictably unpredictable." So, how does a person prepare for such a paradoxical future? The answer lies in embracing other paradoxes such as learning to unlearn, thinking about the unthinkable, embracing failure as a key component of success, and acknowledging that an awareness of one's ignorance is a key component of wisdom. Uldrich's presentations provide scenarios that spell out what the world may look like in just a few short years and provide an in-depth exploration of how the "Internet of Things" and robotics, gaming dynamics and artificial intelligence will change everyday life for all of us by the beginning of the next decade.



Speaker: Jack Uldrich, Global Futurist, Scholar, Author

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6:30-7:30 PM

NETWORKING RECEPTION – Mizner Ballroom & Patio

Join attendees for networking and cocktails.

Reception Sponsored by:

Reception Entertainment Sponsored by:



7:00-11:15 AM

REGISTRATION - Cloister Foyer II

7:00-8:00 AM

BREAKFAST - Mizner Ballroom

Join attendees for breakfast.

12:30-2:30 PM

***OPTIONAL EVENT: Salt Marsh Dolphin Tour with Lunch**

Pre-registration required. Please meet at Cloister dock at 12:30 PM. Boats depart at 1:00 PM.

Enjoy a tour of Sea Island homes with marsh and beach views, education on native flora and fauna, and Sea Island's history as a barrier island along Georgia's coastline. An up-close look at the unique ecosystem of the barrier islands' marshes and the treasures they hold. See oyster beds, live shrimp, shore birds, and aquatic species.



1:00-5:00 PM

***OPTIONAL EVENT: Golf Tournament**

Shuttles will run continuously from lobby starting at 12:00 PM. Shotgun start at 1:00 PM.

Location: The Cloister- Seaside Course

Seaside is an ocean-side links course that combines its beautiful natural setting with a golf course that is both challenging and fun. It is routinely ranked among the top 100 courses in the United States.



Golf Tournament Sponsored by:

Golf Beverage Coolers Sponsored by:



6:30-7:30 PM

NETWORKING RECEPTION – Rainbow Island (Rain Location: Mizner Ballroom)

Shuttles depart hotel lobby starting at 6:20 PM and will run continuously.

Reception Sponsored by:

Reception Entertainment Sponsored by:



7:30- 9:00 PM

DINNER - Rainbow Island (Rain Location: Mizner Ballroom)

Shuttles depart hotel lobby starting at 6:20 PM and will run continuously.

Sponsored by:



7:30-10:40 AM

REGISTRATION - Cloister Foyer II

7:30-8:30 AM

BREAKFAST SESSION- TAX REFORM: COMPANY PERSPECTIVE - Cloister Ballroom

Join attendees for breakfast and session on tax Reform.

Moderator:

Regina Rose, Vice President, Taxes & Retirement Security, ACLI

Speakers:

Matt MacMillen, Vice President, Head of Tax, Lincoln Financial Group

Tom Talajkowski, Vice President, Tax & Tax Policy, Northwestern Mutual

12:00 PM

HOTEL CHECK-OUT

***Please note: Optional Activities are not included in the Spouse/Guest Fee. For more information on these activities, including cost, please inquire at the ACLI onsite registration desk.**