

FINANCIAL & INVESTMENT ROUNDTABLE 2020

MARCH 22-25, 2020 | FORT LAUDERDALE MARRIOTT HARBOR BEACH RESORT & SPA
FORT LAUDERDALE, FL



SPOUSE/GUEST PROGRAM

SUNDAY, MARCH 22

4:00–5:30 PM

REGISTRATION

5:00–5:30 PM

RISEING LEADERS RECEPTION (Invitation Only)

Reception Sponsored by:



5:30–6:30 PM

WELCOME RECEPTION

Reception Sponsored by:

BLACKROCK®

MONDAY, MARCH 23

7:00 AM–5:00 PM

REGISTRATION

7:15–8:15 AM

NETWORKING BREAKFAST

Breakfast Sponsored by:



8:00–8:50 AM

YOGA CLASS – Meet at hotel lobby by 8:00 am

NOTE: This activity is not included in spouse/guest fee. For details, [click here](#).

Relax at a slower paced, meditative yoga class with special emphasis on deep breathing, strengthening and improving body alignment. Rejuvenate while breathing in the smell of the ocean and listening to the sound of the open sea. This is a great opportunity to recharge and relax. ***Note: This event requires a minimum number of attendees. If this minimum is not met, the event will not be held, and attendees will be refunded any fees and notified two weeks prior.**



12:15–1:45 PM

LUNCH SESSION WITH GUEST SPEAKER MIKE MASSIMINO - VIEWS FROM SPACE: LEADERSHIP, TEAMWORK, DETERMINATION



Mike Massimino shares with audiences personal stories of inspiration, innovation, teamwork and leadership as drawn from his experiences in one of the greatest and most dangerous jobs someone can have—NASA astronaut. Through humor and storytelling, he highlights the pursuit and achievement of a childhood dream, the dedication and teamwork necessary to train for one of NASA's most difficult space missions, the determination needed to face tragedies like the Columbia space shuttle accident, and the innovation and leadership necessary to overcome seemingly insurmountable trials when in space and beyond. He leaves his audiences understanding the value of having passion for what you do, of perseverance in achieving a goal, of building a team to meet great challenges, and of creativity and innovation in problem solving. He also inspires audiences with the awe

and beauty of space and shares his thoughts on the future—both personal and regarding the ever-changing and competitive space program.

Speaker:

Mike Massimino, Ph.D., Former NASA Astronaut, Columbia University Engineering Professor

2:00 – 4:30 PM

EARLY DAYS OF FORT LAUDERDALE TOUR - Meet at hotel lobby. Shuttle departs at 2:00 pm

NOTE: This activity is not included in spouse/guest fee. For details, [click here](#).

Enjoy a private guided leisurely stroll through the early days of Fort Lauderdale along the New River. This tour includes admission to the History Museum, the Pioneer House Museum and the 1899 Schoolhouse Museum.

- Open-air museum of early Florida architecture in the wood and masonry vernacular. The largest concentration of historic buildings remaining in Broward.
- History Museum housed in the 1905, National Register New River Inn with includes exhibits of Archaeology, Seminole Culture, Military and Regional History.
- Pioneer House Museum; set as if the family were to return at any moment for Sunday supper. Shows a large collection of antique dolls and toys.
- The 1899 Schoolhouse Museum; complete with wooden desks & McGuffey readers.



- Finalizing the tour with a one-hour historical boat cruise down the Fort. Lauderdale river. ***Note: This event requires a minimum number of attendees. If this minimum is not met, the event will not be held, and attendees will be refunded any fees and notified two weeks prior.**

6:30-7:30 PM

NETWORKING RECEPTION

Reception Sponsored by:



TUESDAY, MARCH 24

7:15-11:30 AM

REGISTRATION

7:45-8:30 AM

NETWORKING BREAKFAST

10:15-10:30 AM

REFRESHMENT BREAK

12:00-3:00 PM

OPTIONAL EVENT: YACHT TOUR OF FORT LAUDERDALE WITH BUFFET LUNCH

PLEASE NOTE: This activity is not included in spouse/guest fee. For more details, check the [General Information Page](#)

Enjoy an afternoon cruise down the intercoastal waterway aboard *The Summer Wind*. Bask in the south Florida "winter" weather and feel the wind on your face as you see how the Ft. Lauderdale elite live! Returning guests to a bygone era when yachting was reserved for presidents, members of society, and kings, *The Summer Wind* yacht proves a respite amongst the south Florida waterways. Formerly owned by the Bacardi family for private retreats, *The Summer Wind* has been completely restored to all her glory and provides the perfect atmosphere for an afternoon cruise.



12:00-5:00 PM

OPTIONAL EVENT: GOLF TOURNAMENT**Time:** 12:00 PM departure & 1:00 PM Shotgun**Location:** Jacaranda Golf Club (East Coast)

PLEASE NOTE: This activity is not included in spouse/guest fee. For more details, check the [General Information Page](#).

Escape to Excellence at Jacaranda Golf Club. Jacaranda Golf Club is a 36-hole facility offering all the amenities of a private country club. Widely considered one of the finest golf and practice facilities in South Florida, the East and West Courses feature gently rolling terrain framed by the lush tropical foliage and waterways of South Florida. Jacaranda is proud of its reputation for impeccably maintained greens, outstanding golf course conditions and superior service from our professionals and staff. Jacaranda Golf Club has been the host site to many PGA and USGA tournaments and qualifying events including: 2004-2016 Broward Men's and Women's Amateur Tournaments, 2000 U.S. Amateur Qualifying, PGA Tour Qualifying School, US Open Qualifying, Florida Open Qualifying, 1995 Florida Open, and voted "Club of the Year" by the South Florida PGA of America.



Golf Beverage Cart Sponsored by:



6:45-7:30 PM

NETWORKING RECEPTION

Reception Sponsored by:



7:30- 9:00 PM

DINNER ON THE BEACH

WEDNESDAY, MARCH 25

7:30-11:00 AM

REGISTRATION

8:00-9:00 AM

BREAKFAST SESSION - RATING AGENCY 2020 OUTLOOK

This panel will discuss rating agency trends and share insights on factors impacting the ratings outlook for the life insurance industry and corporate credit as we move forward in 2020.

Moderator:

Matt Galino, Managing Director, JP Morgan

Speakers:

Sean Egan, Managing Director, Egan-Jones Ratings Company**Carmi Margalit**, Senior Director, S&P Global Ratings

Breakfast Sponsored by:



FIR 2020 SPOUSE/GUEST AGENDA