

Senior Investment Managers Seminar (SIMS)



November 5–8, 2017

THE RITZ-CARLTON, LAGUNA NIGUEL
Dana Point, CA

RETURN TO:

American Council of Life Insurers
Conference Development Department
101 Constitution Avenue, NW; Suite 700
Washington, DC 20001-2133
Telephone: (202) 624-2424 Fax: (202) 624-2425

☐ Mr. ☐ Mrs. ☐ Ms. ☐ Other

Full Name		Name on badge	
Position/title			
Company			
Corporate address	City	State	Zip
Phone	Fax	E-mail	
Spouse/Guest name	Name on badge	E-mail	
Home address	City	State	Zip

CONFERENCE FEES

	On/before Sept 25	After Sept 25
Full conference attendee		
<input type="checkbox"/> ACLI member company	\$1,095	\$1,295
<input type="checkbox"/> Non-member	\$1,495	\$1,695
<input type="checkbox"/> Spouse/Guest	\$275	\$275
Total Registration Fee		\$ _____

ADDITIONAL INFORMATION

Primary person to be notified in case of an emergency

Name	Relationship	Phone
<input type="checkbox"/> First-time attendee at ACLI Senior Investment Managers Seminar		
<input type="checkbox"/> Willing to serve as a discussion leader (ACLI Members Only)		
1. Total assets under management (12/31/16) _____		
2. Primary product line _____		
3. Area of your responsibility (securities, real estate, etc.) _____		

How did you hear about the conference? ☐ ACLI Mailing/Email ☐ ACLI Website ☐ Other

SPECIAL SERVICES

☐ Check here if you are disabled, require special services, have a dietetic requirement or special meal request. Describe or attach a separate sheet if necessary. _____

SESSIONS AND OPTIONAL ACTIVITIES

Day	Session or Activity	No. of registrants	No. of guests
Sunday, November 5			
5:45 PM	Welcome Reception	_____	_____
Monday, November 6			
6:00 AM	Spouse/Guest: Rise & Shine Yoga (\$35)	_____	_____
7:30 AM	Breakfast Presentation: The Great Debates	_____	_____
9:00 AM	General Session: Hidden Gems in Fixed Income	_____	_____
9:15 AM	Spouse/Guest: Eco-Adventure Walk (\$75)	_____	_____
10:15 AM	General Session: Commercial Real Estate Update	_____	_____
11:15 AM	General Session: Private Market Investments	_____	_____
12:15 PM	Luncheon: What Journalists Aren't Saying But Want To	_____	_____
1:45 PM	General Session: Potential Sources of Investment	_____	_____
2:30 PM	General Session: Recent Trends in Portfolio Management	_____	_____
3:30 PM	General Session: The Expanding Role of ETFs	_____	_____
4:30 PM	Discussion Groups (ACLI Members Only)	_____	_____
6:30 PM	Networking Reception	_____	_____
Tuesday, November 7			
7:30 AM	Networking Breakfast	_____	_____
8:30 AM	General Session: NAIC Regulatory Update	_____	_____
9:45 AM	General Session: Energy Update	_____	_____
10:45 AM	Discussion Groups (ACLI Members Only)	_____	_____
1:00 PM	Golf Tournament: Monarch Beach Golf Links (\$250 per person; includes greens fees, golf cart, tees, box lunch, transportation and unlimited practice range use)	_____	_____
	Handicap _____	_____	_____
	_____ Left or right hand (\$85 optional club rental)	_____	_____
2:30 PM	Stand-Up Paddle Boarding (\$225)	_____	_____
6:45 PM	Networking Reception	_____	_____
7:30 PM	Dinner	_____	_____
Wednesday, November 8			
7:00 AM	Breakfast Presentation: Blockchain in Financial Services	_____	_____

FEE SUMMARY

Activity	Details and cost	Fee	No. of participants	Total
Rise & Shine Yoga	\$35 per person	_____	_____	\$ _____
Eco-Adventure Walk	\$75 per person	_____	_____	_____
Golf	\$250 per person	_____	_____	_____
Club Rental	\$85 per person	_____	_____	_____
Stand-Up Paddle Boarding	\$225 per person	_____	_____	_____
Subtotal	Optional activities			\$ _____
Subtotal	Registration (bring total from first page)			\$ _____
Total	Amount due (registration plus optional activities)			\$ _____

METHOD OF PAYMENT

☐ Check enclosed \$ _____ * US Dollars Only

For credit card payments please process registration online at www.acli.com.

Send registration and **payment to**: American Council of Life Insurers, Conference Development Department, 101 Constitution Avenue, NW, Suite 700, Washington DC 20001; Fax (202) 624-2425

HOUSING

ACLI has reserved a block of rooms at The Ritz-Carlton, Laguna Niguel, Dana Point, CA.. until **Wednesday October 4, 2017**. The group rate is \$305 (single/double) plus applicable taxes. Reservation requests received **Wednesday, October 4, 2017** will be accepted on a space available basis, at the hotel's prevailing rate. Reservations can be made [online](#) or by phone: (877) 266-6065.

CANCELLATIONS/REFUNDS

Conference cancellations received before **Wednesday, October 4, 2017** will be refunded, less a \$175 administrative/cancellation fee. Spouse/Guest registration fees will be refunded less a \$50 administrative/cancellation fee. Optional activity cancellations (sports/tours) received before October 4, 2017, will be refunded less a \$50 administrative fee. All cancellations and requests for refunds must be submitted in writing. Please send the request via email to acliconferences@accli.com or by fax to 202-624-2425. No refunds will be issued after **October 4, 2017**. For inquiries, or more information regarding administrative policies such as complaint and refund, contact ACLI registration at acliconferences@accli.com or (202) 624-2424.