

# Senior Investment Managers Seminar (SIMS)

As of July 25, 2017



November 5–8, 2017

THE RITZ-CARLTON, LAGUNA NIGUEL  
Dana Point, CA

## GENERAL INFORMATION

### CONFERENCE REGISTRATION & BADGES

| Registration Fees    | Early Bird     |               |
|----------------------|----------------|---------------|
| Date of registration | Before 9/25/17 | After 9/25/17 |
| ACLI Member Company  | \$1,095        | \$1,295       |
| Non-member           | \$1,495        | \$1,695       |
| Spouse/Guest*        | \$275          | \$275         |

### SPOUSE/GUEST PROGRAM

Spouse/Guest program fee includes daily breakfast, Monday Lunch, Tuesday Dinner, and nightly receptions.

*\* ACLI DEFINES A "GUEST" AS A SPOUSE, CHILD, OR COMPANION – NOT A PROFESSIONAL COLLEAGUE. A professional colleague is defined as someone who consults with or is employed by an organization in the financial services industry. Any person not meeting the criteria of "guest" who wishes to participate in any ACLI function at the conference is required to register separately at the prevailing conference rate.*

### REGISTRATION & BADGE INFORMATION

Your badge and meeting materials may be picked up at the ACLI Registration Desk.

### REGISTRATION HOURS

|                       |                    |
|-----------------------|--------------------|
| Sunday, November 5    | 4:00 pm – 5:30 pm  |
| Monday, November 6    | 7:00 am – 5:30 pm  |
| Tuesday, November 7   | 7:00 am – 11:45 am |
| Wednesday, November 8 | 6:45 am – 8:00 am  |

### BADGE CORRECTIONS

The name, company and address that appear on your registration form will be used for your badge and the registration list. (Where an informal name has been indicated in our database, it will be used on your badge. If corrections are necessary, please notify ACLI at (202) 624-2424 or email [GenevaBarber@acll.com](mailto:GenevaBarber@acll.com).

### MEETING CANCELLATIONS/REFUNDS

Cancellation notices must be submitted in writing to ACLI by email to [GenevaBarber@acll.com](mailto:GenevaBarber@acll.com).

- Refund requests must be received no later than **Wednesday, October 4**. No refunds will be issued after October 4.
- Registration fees are refunded less \$175 administrative fee.
- Spouse/Guest fees are refunded less \$50 administrative fee.
- Activity fees are refunded less \$50 administrative fee.
- Substitutions are welcome, but should be emailed to [GenevaBarber@acll.com](mailto:GenevaBarber@acll.com).

### HOTEL INFORMATION

The Ritz-Carlton, Laguna Niguel  
One Ritz-Carlton Drive  
Dana Point, CA 92629  
Phone: (949) 240-2000



Reservation by phone: 877-266-6065  
Reference ACLI Senior Investment Managers Seminar when calling for Reservations.  
To Reserve online: [Click here](#)

### Room Reservations:

A group rate for room accommodations has been reserved for meeting participants. By reserving your room at The Ritz-Carlton, you are helping ACLI fulfill our contractual obligations.

**Rate:** Single/double **\$305/night** plus applicable taxes.

**Cutoff date for ACLI room rate is Wednesday, October 4**, or once the ACLI room block is filled (whichever comes first). Reservations received after this date will be made on a space available basis, at the hotel's prevailing rate.

Hotel check-in: 4:00 pm  
Hotel check-out: 11:00 am

**Hotel room cancellations:** A deposit equal to two (2) night's room charge will be required per reservation. Individual deposits are refundable until **Friday, October 21, 2017**. Cancellations received after this date, will result in forfeiture of deposit.

### WHAT TO WEAR

Resort casual attire for all functions is appropriate. Resort casual means men may wear – casual slacks, collared shirts, sweaters (jacket optional). Women may wear casual slacks, sweaters, blouses, dresses or skirts.

### WEATHER

The weather in Dana Point during mid-November averages between the low 70's during the day and low 50's at night.

### PROGRAM UPDATES

For more information, visit our website:

<https://www.acli.com/Events/All-Events/SIMS-2017>

## TRAVEL INFORMATION

### AIRPORT

There are multiple airports convenient to the hotel including: John Wayne/Orange County Airport (**SNA**) located 25 minutes/23 miles; Long Beach Airport (**LGB**) located 45 minutes/44 miles; Los Angeles International Airport (**LAX**) located 60 minutes/63 miles; San Diego Lindbergh Field Airport (**SAN**) located 75 minutes/67 miles.

### GROUND TRANSPORTATION

The Ritz-Carlton, Laguna Niguel is proud to use Best Chauffeured Worldwide as their provider of guest limousine, sedan and van transportation needs. Special needs and services (i.e. car seats, elderly or child travelers, etc.) are easily accommodated. **For individual/leisure guest transportation reservations and pricing, please contact the Concierge Desk at (949) 240-2000, ext. 5360. Rates, information and vehicle details are subject to change.**

### PARKING

Valet parking is offered; self-parking is not available on property.

## OPTIONAL ACTIVITY INFORMATION

### Tuesday, November 7, 2017

#### GOLF TOURNAMENT

**Time:** 1:00 PM Shotgun Start

**Location:** Monarch Beach Golf Links

**Cost:** \$250 per person

(includes greens fee, golf car, tees, towels, box lunch, transportation and unlimited practice range use)

**Club rentals:** \$85 per set (includes 2 sleeves of golf balls)

**Nike golf shoe rental:** \$25 per pair.



Few California golf resort experiences can match the blend of stunning natural beauty and the variety of challenges presented at Monarch Beach Golf Links. Here, along the dramatic bluffs overlooking the Pacific Ocean in Southern California, master golf architect Robert Trent Jones, Jr., has fashioned a one-of-a-kind golf course design – challenging and fair, with views of surf breaks on every hole.

### Tuesday, November 7, 2017

#### STAND-UP PADDLE BOARDING\*

**Time:** 2:30-4:30 PM

**Cost:** \$225.00 per person

(includes: transportation, light snack, certified instructor, gratuity, and equipment)



Learn to stand up paddle and experience California's incredible coastline from the water. Before taking a leisurely paddle through the calm waters in Dana Point Harbor you will be provided with private group instruction. You will then learn about the abundant marine life. The activity is physical though not strenuous.

No previous paddling experience is necessary; however, be prepared to get your feet wet. *\*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.*

## SPOUSE/GUEST PROGRAM

The Spouse/Guest program fee is \$275 and includes the following events: daily breakfast, Monday Lunch, receptions nightly and Tuesday night Dinner. Please visit our [website](#) for the spouse/guest program agenda.

In addition to the events included in the spouse/guest program registration fee, the following optional activities can be added for an additional cost. Details are outlined below.

### MONDAY, NOVEMBER 6

#### RISE AND SHINE YOGA\*

**Time:** 6:00-7:00 AM

**Cost:** \$35.00 per person  
(includes instructor, equipment and bottled water)



Yoga teaches students how to breathe well, stretch the body and relax, producing an overall heart-healthy workout. The various poses are designed to gently stretch muscles and enhance relaxation. Regular yoga workouts lower blood pressure, help relieve arthritis and headache pain, lower stress and help with sleeping problems.

*\*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.*

#### ECO-ADVENTURE WALK\*

**Time:** 9:15-11:15 AM

**Cost:** \$75.00 per person (includes guide, gratuity, and light snack)

Investigate the local foliage and wildlife of the Dana Point Headlands and learn how they have adapted to life on the ever-changing coast. Accompanied by marine biologists, you will learn about kelp forest ecology. *\*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.*

## HOTEL INFORMATION

### SPA

Indulge in the best luxury treatments inspired by the sea at The Ritz-Carlton Spa, Laguna Niguel. Essential elements from the ocean bring life, well-being, and new beginnings with rich minerals, sea salt, algae and water. This unique foundation sets the tone for every Dana Point escape with the purest benefits.

*Daily: 9:00 am – 5:00 pm*

*Reservations: (949) 240-2000 or [online here](#)*

## HOTEL DINING & ENTERTAINMENT

### RAYA

Oceanview all day dining featuring Pan-Latin coastal cuisine. Raya is an innovative restaurant concept by acclaimed Chef Richard Sandoval. Showcasing Pan-Latin Coastal Cuisine prepared with sustainable seafood, local produce, natural and organic meat and Chef Richard Sandoval's signature Latin flavors, this restaurant is a true one-of-a-kind dining destination.

|                               |                           |
|-------------------------------|---------------------------|
| <i>Breakfast Daily</i>        | <i>7:00 am - 11:30 am</i> |
| <i>Lunch Daily</i>            | <i>11:30 am - 2:00 pm</i> |
| <i>Dinner Sun. -Thurs.</i>    | <i>6:00 pm - 9:00 pm</i>  |
| <i>Dinner Fri. &amp; Sat.</i> | <i>6:00 pm - 10:00 pm</i> |
| <i>Sunday Brunch</i>          | <i>11:00am - 2:00 pm</i>  |

### ENOSTEAK

enoSTEAK is an intimate steakhouse featuring only the highest quality ingredients. All the steaks are from prime and grass-fed, pasture-raised beef. The organic produce is grown locally and harvested at the peak of the season.

|                            |                           |
|----------------------------|---------------------------|
| <i>Dinner Tues. - Sat.</i> | <i>6:00 pm - 10:00 pm</i> |
|----------------------------|---------------------------|

### 180BLŪ

180blū is an oceanfront lounge featuring panoramic views of the Pacific Ocean and the blue skies across the horizon. Perched 150-feet above Salt Creek Beach, 180blū is the perfect Southern California experience to enjoy refreshing hand-crafted beverages, small plates from Raya and a little slice of heaven on earth!

|                        |                            |
|------------------------|----------------------------|
| <i>Daily</i>           | <i>11:30 am - 11:00 pm</i> |
| <i>Fri. &amp; Sat.</i> | <i>11:30 am - 12:00 am</i> |

### THE MARKET PLACE

The Market Place offers guests a healthy take on fast casual dining with fresh, organic and all natural ingredients. Guests who are looking to grab a bite will enjoy a selection of healthier and fresh menu selections.

|              |                          |
|--------------|--------------------------|
| <i>Daily</i> | <i>6:00 am - 9:00 pm</i> |
|--------------|--------------------------|

### BAR RAYA

Bar Raya is a gathering place in the casual confines of the Bar's sophisticated, yet friendly atmosphere. Fine cocktails, appetizers and company are even finer alongside the breath-taking ocean views and stylized, silver bar.

|                      |                            |
|----------------------|----------------------------|
| <i>Sun.</i>          | <i>11:30 am - 12:00 am</i> |
| <i>Mon. - Thurs.</i> | <i>11:30 am - 12:00 am</i> |
| <i>Fri. - Sat.</i>   | <i>11:30 am - 1:00 am</i>  |

Thanks to our Strategic Partner:



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