FINANCIAL & INVESTMENT ROUNDTABLE 2025



APRIL 13-16, 2025, THE RITZ-CARLTON, AMELIA ISLAND, AMELIA ISLAND, FL

GENERAL INFORMATION

Registration Fees	Early Rate Before 2/14/25	Regular Rate After 2/14/25
ACLI Member Company	\$1,475	\$1,675
Non-member	\$2,475	\$2,675
Spouse/Guest*	\$375	\$375

SPOUSE/GUEST

Spouse/Guest fee includes daily breakfast, Monday lunch, Tuesday dinner as well as receptions nightly.

* 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.

4:00-5:30 PM

7:00 AM-3:45 PM

7:00-11:30 AM

7:30-9:00 AM

Registration Hours

Sunday, April 13 Monday, April 14 Tuesday, April 15 Wednesday, April 16

BADGE CORRECTIONS

The name, company and city/state 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 <u>GenevaBarber@acli.com</u>.

MEETING CANCELLATIONS/REFUNDS

Cancellation notices must be submitted in writing to ACLI by email to <u>GenevaBarber@acli.com</u>.

- Refund requests must be received no later than **Feb. 16.** No refunds will be issued after **Feb. 16.**
- Registration fees are refunded less \$175 administrative fee.
- Spouse/Guest fees are refunded less \$50 administrative fee.
- Activity fees will be refunded less \$50 administrative fee. No refunds are issued after March 22.
- Substitutions are welcome and should be emailed to <u>GenevaBarber@acli.com</u>.

HOTEL INFORMATION

The Ritz-Carlton Amelia Island, Amelia Island, FL 4750 Amelia Island Pkwy Amelia Island, FL 32034

NOTE: No phone reservations allowed. Attendees must use the link provided by ACLI to reserve a room.

Rate: Single/double \$429.00 per night plus applicable taxes and resort fee of \$32/night. All rooms are subject to state, local, and lodging taxes.

Cutoff date for ACLI room rate is March 14, 2025, 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: Reservations can be canceled up to 24 hours prior to arrival without penalty. If complete cancellation takes place within 24 hours of the scheduled arrival a cancellation fee equal to one (1) night's room revenue will be charged.

PARKING

Valet Parking on property only. Self-parking not available. For transport, taxi service is recommended instead of ride share.

THE RITZ-CARLTON AMELIA ISLAND HOTEL INFORMATION

For information on restaurants, spa, golf, and more, visit the <u>hotel website.</u>

AIRPORT/GROUND TRANSPORTATION

The Ritz-Carlton Amelia Island is located 27 miles from Jacksonville International airport (JAX) and 1 mile from the Fernandina Beach Municipal Airport (FHB).

PROGRAM UPDATES: For more information, visit our website: <u>Financial & Investment Roundtable 2025</u>

WEATHER: The weather in Sea Island ranges from high 70s to low 60s degrees during early April.

WHAT TO WEAR: Resort casual attire for all functions is appropriate, including travel clothes for the closing session on Wednesday, April 16.

SPOUSE/GUEST REGISTRATION

The spouse/guest fee is \$375 and includes daily breakfast, Monday lunch, Tuesday dinner, and nightly receptions. **In addition to the events** included in the spouse/guest program registration fee, optional activities can be added for an additional cost. Details are outlined below.

OPTIONAL EVENTS - TUESDAY, APRIL 15, 2025

GOLF TOURNAMENT Time: 1:00-5:00 PM Location: The Golf Club of Amelia Island Cost: \$275 per person (fee includes greens fee, gratuity, box lunch, and unlimited practice range use) Club rentals: \$90



PICKLEBALL & PROSECCO SOCIAL

Time: 3:00-5:00 PM

Cost: \$125/person (includes equipment, light snacks, prosecco and gratuities)

All levels are welcome. If you are new to pickleball, an experienced dinker, or just want to be social and cheer on your fellow attendees with a cocktail, join us for this fun afternoon event.