

# Senior Investment Managers Seminar (SIMS)



November 5–8, 2017

THE RITZ-CARLTON, LAGUNA NIGUEL  
Dana Point, CA

## PRELIMINARY PROGRAM (as of July 26, 2017)

### SPOUSE/GUEST PROGRAM

**SUNDAY, NOVEMBER 5**

4:00–5:30 PM

**REGISTRATION**

5:45–6:45 PM

**WELCOME RECEPTION**

Sponsored By:



**MONDAY, NOVEMBER 6**

6:00–7:00 AM

**OPTIONAL ACTIVITY:**

**RISE AND SHINE YOGA\* - Meet at Gazebo by 5:45 AM**

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

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 registered 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.*



7:00 AM–5:30 PM

**REGISTRATION**

7:30–9:00 AM

**BREAKFAST PRESENTATION**

**The Great Debates: Economic Outlook/Policy**

This session will include a debate on the current economic outlook. Are you a Bull or a Bear? Will your viewpoint change after this debate? Our debaters will focus on a U.S. centric viewpoint that includes discussion on tax reform, political policy impact on industry and more.

**Moderator:**

**Richard Lui**, Journalist and News Anchor, MSNBC and NBC News

**Speaker:**

**Tiffany Wilding**, SVP, U.S. Economist, PIMCO

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9:15 - 11:15 AM

**OPTIONAL ACTIVITY:**

**ECO-ADVENTURE WALK\***

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

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.*

12:15-1:45 PM

**LUNCH PRESENTATION**

**WHAT JOURNALISTS AREN'T SAYING BUT WANT TO**

In his last network interview President, Barack Obama admitted he missed something: "I underestimated the degree...it is possible for misinformation, for cyber hacking and so forth to have an impact on our open societies, our open systems, to insinuate themselves into our democratic practices in ways that I think are accelerating." If fake news can influence the most powerful structures and processes of US government, some ask how might it take down, and conversely build up large organizations--for-profit, not for profit, government-linked or otherwise. Richard explores not only the various permutations of fake news as it's affected journalism, elections and their outcomes, but also the environmental factors allowing it to exist.

**Speaker:**

**Richard Lui**, Journalist and News Anchor, MSNBC and NBC News



Lunch Sponsored by:



6:30-7:30 PM

**NETWORKING RECEPTION**

TUESDAY, NOVEMBER 7

7:00-11:45 AM

**REGISTRATION**

7:30-8:30 AM

**NETWORKING BREAKFAST**

1:00-5:00 PM

**OPTIONAL ACTIVITIES - PLEASE NOTE: these activities are not included in spouse/guest fee. For more details, check the [General Information Page](#).**

1:00 PM

**Optional Activity:**

**GOLF TOURNAMENT**

Location: Monarch Beach Golf Links

Golf Tournament Sponsored by:



**Asset Management**

Golf Beverage Cart Sponsored by:



2:30-4:30 PM

**Optional Activity:**

**STAND-UP PADDLE BOARDING\***

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.*



6:45-7:30 PM

**NETWORKING RECEPTION**

Reception Sponsored by:



Entertainment Sponsored by:



7:30-9:15 PM

**DINNER**

Sponsored by:



**Asset Management**

WEDNESDAY, NOVEMBER 8

6:45-8:00 AM

**REGISTRATION**

7:00-8:00 AM

**BREAKFAST PRESENTATION/CLOSING SESSION**

**Blockchain in Financial Services**

This session will provide a discussion of blockchain technology usage in financial services. Where are the opportunities and what is the timeline to implementation?

Breakfast Sponsored by:



**STRATEGIC PARTNER**



**Asset  
Management**

**ACLI Antitrust Notice**

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**Registration Requirements:** Pre-register with ACLI. A copy of the registration form is available at <https://www.acli.com/Events/All-Events/SIMS-2017> . For further information or to register, you may contact ACLI at (202) 624-2424.