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SYMMETRY<sup>®</sup>

# SUMMIT

# 2023

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October 18 & 19

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SYMMETRY  
SUMMIT  
**2023**

WELCOME TO  
**SYMMETRY SUMMIT**



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SYMMETRY  
SUMMIT  
2023

# Agenda

October 18 & 19

## Wednesday, October 18

### Morning

#### Optional Meetings With Symmetry Partners Team Members & Office Tours

12:00 PM – 1:00 PM

#### Lunch

*Sponsored by Orion Advisor Solutions*

1:00 PM – 1:15 PM

#### Welcome

David Connelly, Symmetry Co-Founder & Principal

1:15 PM – 2:00 PM

#### Winning & Serving the HNW – The Opportunity

William Chettle, Head of Client Experience & Advisor Services, Symmetry Partners

Tom Romano, Head of Strategic Relationships & Product Development, Symmetry Partners

2:00 PM – 3:15 PM

#### The Value of an Investment Philosophy

Christian Newton, Vice President, Dimensional Fund Advisors

3:15 PM – 3:30 PM

#### Break

3:30 PM – 4:15 PM

#### The Case for Alternatives – AQR Perspective

Toby Moskowitz, PhD, Principal, AQR Capital Management

4:15 PM – 4:45 PM

#### New Symmetry Tools & Technology to Power Your Practice

Rob Hawke, Managing Director, Operations & Technology, Symmetry Partners

Andrea Loin, Associate Director, Marketing, Symmetry Partners

4:45 PM – 5:30 PM

#### How Advisors Are Winning & Serving HNW Clients

Moderated by Greg Trzaski, Senior Regional Director, Symmetry Partners

With Guest Advisors Brian Cote, Kelley Grace, and Mira Ma

5:30 PM

#### Wrap Up

5:45 PM

#### Reception & Dinner

The Boathouse

*Sponsored by Dimensional Fund Advisors*

## Thursday, October 19

8:00 AM – 8:45 AM

#### Breakfast

*Sponsored by J.P. Morgan Asset Management*

8:45 AM – 9:00 AM

#### Market & Factors Update

John McDermott, PhD., Chief Investment Strategist, Symmetry Partners

9:00 AM – 9:45 AM

#### HNW Solutions – Axiom

Rebecca Cioban, CFA, Director, Investments, Symmetry Partners

Kevin Scully, CFA, Director, Investments, Symmetry Partners

9:45 AM – 10:15 AM

#### Tax Strategies for the HNW Client (Part I)

John McDermott, PhD., Chief Investment Strategist, Symmetry Partners

Glenn Shirley, CAIA, Principal, Head of Investor Relations, Quantinno Capital Management

10:15 AM – 10:45 AM

#### Tax Strategies for the HNW Client (Part II)

Arthur Fischer-Zernin, Managing Director, AQR Capital Management

John McDermott, PhD., Chief Investment Strategist, Symmetry Partners

10:45 AM – 11:00 AM

#### Break

11:00 AM – 11:45 AM

#### HNW Solutions – DFA Perspective

Wes Crill, PhD, Senior Investment Director & Vice President, Dimensional Fund Advisors

11:45 AM – 1:00 PM

#### Lunch

*Sponsored by Axos Advisor Services*

1:00 PM – 1:45 PM

#### 5 Important Questions for Business Owner Clients & Prospects

Mitch Kerr, CFA, VP, Associate Head of Wealth Advisory, Orion Advisor Solutions

1:45 PM – 2:30 PM

#### Fraud Prevention & Cybersecurity Best Practices

Patrick Hennessey, CFA, Director, Business Consulting & Education, Schwab Advisor Services

2:30 PM – 2:45 PM

#### Break

2:45 PM – 3:30 PM

#### Marketing to the HNW

Andrea Loin, Associate Director, Marketing, Symmetry Partners

3:30 PM – 4:15 PM

#### Creating an Exceptional Client Experience

William Chettle, Head of Client Experience & Advisor Services, Symmetry Partners

4:15 PM – 4:30 PM

#### Wrap Up

4:30 PM – 7:30 PM

#### Optional Reception & Dinner

Hosted by Symmetry Partners

*Sponsored by AQR Capital Management*

## Shuttle Schedule

### Wednesday, October 18

11:45 AM & 12:00 PM

#### Hilton to Symmetry

5:30 PM & 5:45 PM

#### Symmetry to Boathouse

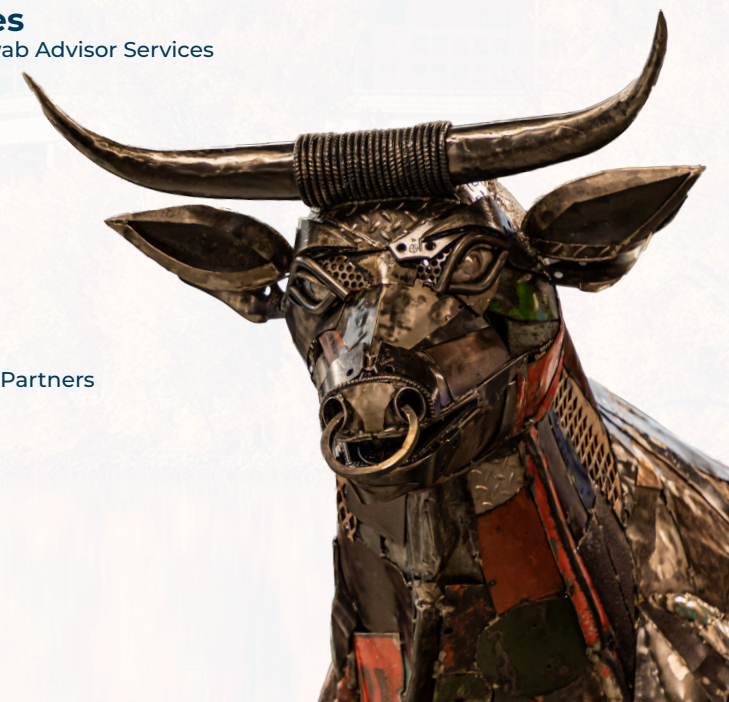
9:15 PM & 9:30 PM

#### Boathouse to Hilton

### Thursday, October 19

7:45 AM & 8:00 AM

#### Hilton to Symmetry







**Wes Crill, PhD**

Senior Investment Director & Vice President,  
Dimensional Fund Advisors



**Arthur Fischer-Zernin**

Managing Director,  
AQR Capital Management



**Patrick Hennessey, CFA®**

Director of Business Consulting & Education,  
Schwab Advisor Services



**Mitch Kerr, CFA®**

Vice President,  
Associate Head of Wealth Advisory,  
Orion Advisor Solutions



**Toby Moskowitz PhD**

Principal,  
AQR Capital Management



**Christian Newton**

Vice President,  
Dimensional Fund Advisors



**Glenn Shirley, CAIA**

Principal, Head of Investor Relations  
Quantinno Capital Management



Scan to learn more  
about our speakers



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# SYMMETRY SUMMIT 2023

## Additional Services During Summit

While you're at the Symmetry Summit, we want you to enjoy more than just the networking and presentations. We encourage you to take advantage of two optional experiences:

### Tech Lab

As an Advisor, technology is integral—both behind the scenes and when you engage with clients. Explore the technology available to you with hands-on demos of the updated **MySymmetry** website and the new **Advisor Portal**.

Visit the Tech Lab to find out how you can increase productivity, simplify and streamline client interactions, and easily access resources and communications.

### Headshot Room

Does your headshot need a refresh? Good news, you can sign up for a headshot while you're here. (Sign-Up sheets outside the Headshot Room.)

## Tech Lab & Headshot Room Hours

Located upstairs, across from the conference room

### Wednesday, October 18

**Morning**  
During Office Tours  
**12:00 PM – 1:00 PM**  
During Lunch

### Thursday, October 19

**8:00 AM – 8:45 AM**  
During Breakfast  
**11:45 AM – 1:00 PM**  
During Lunch

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Symmetry's Resources & Solutions

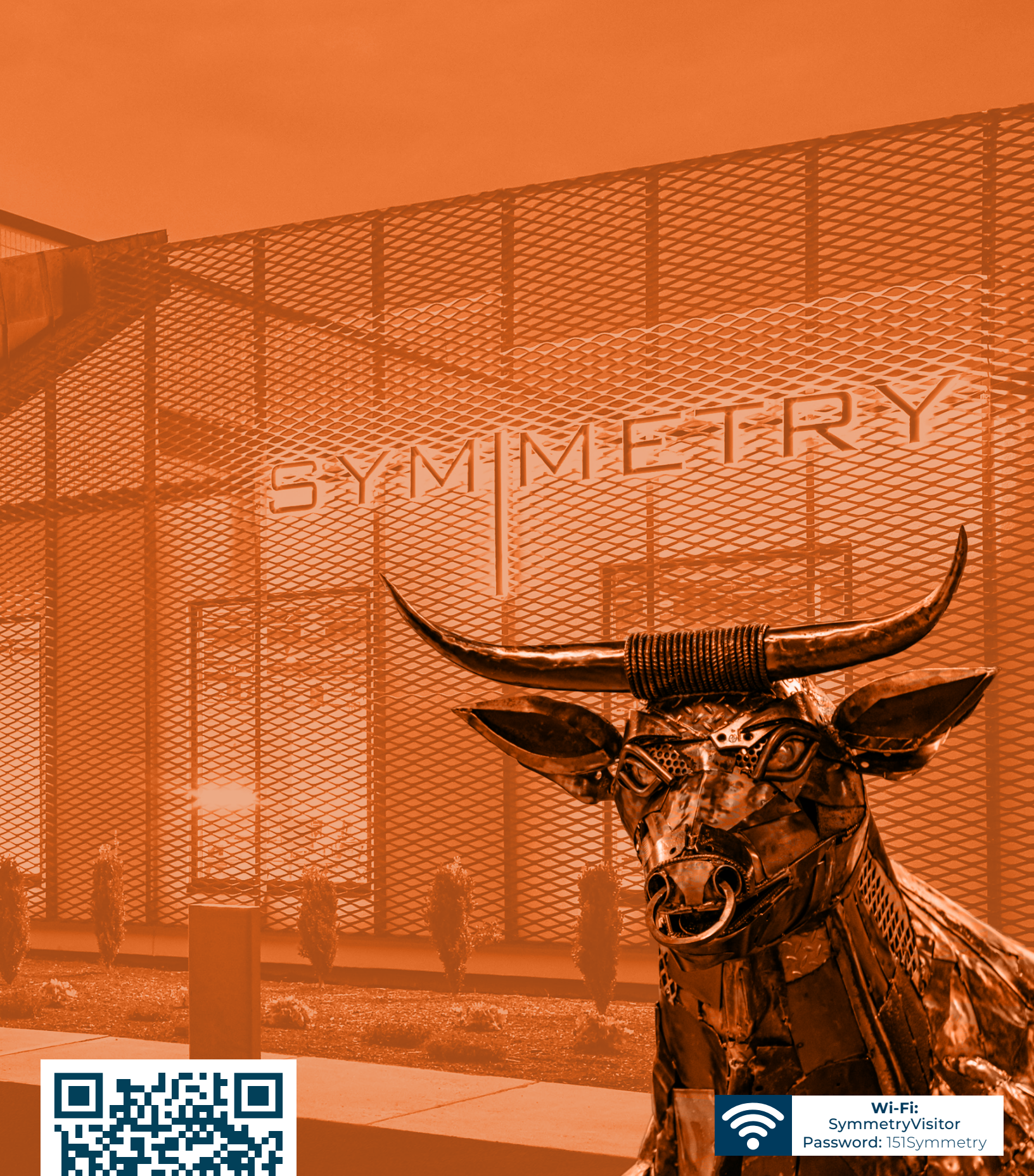
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