

# Segal Marco Advisors

## 2021 Virtual Client Conference

*Tuesday, May 4–Wednesday, May 5*

Time		Sessions Title and Description	Speaker(s)
<b>Day 1: Tuesday, May 4, 2021, 2:00–4:30 EDT</b>			
Open at 2:00	5 min	<b>Introduction</b>	John DeMairo
2:05–2:25	20 min	<ul style="list-style-type: none"> <li>• Thanks, SMA 2020</li> <li>• Cover activity at SMA and plans, include D&amp;I efforts, initiatives, org chart</li> </ul>	
2:25–2:45	20 min	<b>Global Market Environment: Where Are We Headed?</b>	<b>Moderator:</b> Tim Barron
2:45–3:05	20 min	<ul style="list-style-type: none"> <li>• Short term perspective: Next 12–18 months</li> <li>• Longer term perspective: Demographics, Technology, Populism, Income inequality</li> </ul>	Dan Westerheide and Sue Crotty John Marco and T.J. Kistner
3:05–3:20	15 min	<b>Break</b>	
3:20–3:50	30 min	<b>Long-Term Assumption Update</b> CAPM and Asset Allocation and what does it tell us for returns. New Asset Classes: Crypto and Gold?	John Ross and John Hume
3:50–4:20	30 min	<b>Asset Class Dive Down — Fixed</b> Adding returns to your fixed income	Moderator: Rick Pietrzak Francoise Otieno and Don Sheridan
4:20–4:30	10 min	<b>Closing for the day</b>	John DeMairo
<b>Day 2: Wednesday, May 5, 2021, 2:00–4:30 EDT</b>			
2:00–2:05	5 min	<b>Opening for the day</b>	John DeMairo
2:05–2:30	25 min	<b>Equity: The Engine of Return</b>	<b>Moderator:</b> Rosemary Guillette
2:30–3:05	35 min	<ul style="list-style-type: none"> <li>• <b>Public:</b> A Story of Cycles</li> <li>• <b>Private:</b> Making Sense of VC, GE, SS and SPACS</li> </ul>	Geoff Strotman and Donell Ward Michael St. Germain, Vanessa Vargas and Alan Kosan
3:05–3:20	15 min	<b>Break</b>	
3:20–3:50	30 min	<b>Real Estate: Where are we going?</b>	Linda McDonald and Michael Joyce
		<ul style="list-style-type: none"> <li>• Open end/closed end real estate outlook</li> <li>• What are implications for my portfolio?</li> </ul>	
3:50–4:20	30 min	<b>Legislative Update</b>	<b>Moderator:</b> Julian Regan Julia Zuckerman (Segal) Katherine Hesse, Esq., Murphy, Hesse, Toomey & Lehane LLP
4:20–4:30	10 min	<b>Closing</b>	John DeMairo