

Segal Marco Advisors 2022 Virtual Client Conference

2022: The Year of Change

Day 1: Tuesday, May 17, 2022, 2–4:30 pm EDT

2 pm	5 min	Introduction	
2:05–2:25	20 min	Opening: Segal Marco update, Company plans and initiatives	John DeMairo
2:25–2:45	20 min	Setting the Stage: 2021 in context and 2022: where are we?	Michael Joyce and Seth Almaliah
2:45–3:15	30 min	Looking Ahead: The Fed, inflation and interest rates	Sue Crotty and TJ Kistner
3:15–3:30	15 min	Break	
3:30–4:00	30 min	Fixed Income, Credit Markets Update and Trends: Is now the time for adding protection? How is liquidity given geopolitical events?	<i>Moderator:</i> Christian Sevier Don Sheridan and Francois Otieno
4–4:20	20 min	Equity Market Update and Trends: Market concentration/cycles and flows	<i>Moderator:</i> Rosemary Guillette Geoff Strotman and Donell Ward
4–4:30	10 min	Closing	John DeMairo

Day 2: Wednesday, May 18, 2022, 2–4:30 pm EDT

2 pm	5 min	Opening	John DeMairo
2:05–2:25	20 min	Technology and Innovations: Digital currencies/Cryptocurrencies/NFTs — What they are and where we are	<i>Moderator:</i> Vanessa Vargas Benji Patzik and Michael Lyons
2:25–2:45	20 min	Private Equity Update: Update on markets and valuations, new structures and legislative proposals	<i>Moderator:</i> Joey Mallon Michael St. Germain and Alan Kosan
2:45–3:05	20 min	Real Assets Update: Real assets and inflation dynamics; changes in real estate open end sector structures	<i>Moderator:</i> Tanya Keady Linda McDonald and Jingle Huang
3:05–3:20	15 min	Break	
3:20–3:50	30 min	Increasing importance of ESG in investing and governance: ESG and DEI update — Segal Marco's work in ESG and DEI	<i>Moderator:</i> Julian Regan Maureen O'Brien and Rosa Limas
3:50–4:15	25 min	Regulatory Update: ARPA, Fiduciary Rule, DC	Rick Pietrzak and John Hume
4:15–4:20	5 min	Closing	John DeMairo