

Spring Partner Meeting

Meeting Agenda

Location: Marriott Hotel, Livonia, MI

Date: Tuesday & Wednesday, April 23-24, 2024

Time: Tuesday 1:00pm – 8:00pm

Wednesday 8:00am – 12:00pm

TUESDAY

Welcome, Introductions & Expectations

2023 Accomplishments

Rod Zeeb

Break

Leveraging Our Partnership to Win Business (Review DI & case studies)

Partner Best Idea/Story

Manager Focus – Beaumont – AI

Closing Thoughts & Action Item Take-Aways

Cocktails & Dinner

WEDNESDAY

Breakfast (Hot)

Quick day 1 recap and agenda review

Market Review

Manager Focus #2 – Russell – Tax mgt.

Break

Manager Focus #3 – Ocean Park – Fixed income expertise

Technology (CPR, review panels, reports for reviews, RMD dashboard

Wrap up & Action Items

