



Advisor Forum

Atlanta | Thursday, March 8

St. Regis Hotel, 88 West Paces Ferry Rd NW
8:30 AM - 12:30 PM

Agenda

- 8:30 AM **Registration opens (light breakfast provided)**
- 9:00 AM **Managing difficult client meetings and conversations with comfort and clarity**
Kirsten Smith - Senior Consultant Executive Coach, Lange International
"Every day, advisors are faced with significant communication moments when meeting with clients or prospects. In these interactive sessions, we will explore tools and techniques on how to better connect with clients and clearly address their difficult questions.
- 9:40 AM **Why diversification matters in all markets**
Alex Zweber, CFA - Senior Portfolio Manager, Parametric
Market volatility is inevitable and unnerving to many investors. Learn how institutions successfully dealt with this challenge, some times in unique ways.
- 10:20 AM **Interactive working session on how to better connect with clients and clearly address their difficult questions**
- 10:40 AM **Break**
- 10:50 AM **How to preserve multigenerational wealth**
Jennifer Sireklove, CFA - Director of Responsible Investing, Parametric
While many advisors shy away from Responsible Investing due to preconceived notions about its effect on portfolio performance, investor interest has grown significantly among millennials, Gen X and women. Learn how you can use this opportunity to connect to the next generation of clients.
- 11:30 AM **Interactive working session on how to better connect with clients and clearly address their difficult questions**
- 11:50 AM **Closing and Lunch**

Event Details



The Venue

The St. Regis Hotel in the Buckhead District
88 West Paces Ferry Rd NW
Atlanta, GA 30305

Date & Time

Thursday, March 8 | 8:30 AM - 12:30 PM
Program begins at 9:00 AM

Parking

Valet parking will be validated

Dress Code

Attire is business casual

Dietary Restrictions

Email PPA-MKTG-Events@paraport.com
with your specific needs

Speakers

Kirsten Smith

*Senior Consultant Executive Coach,
Lange International*

Ms. Smith works with leaders to expand their sphere of influence through a strong presence and powerful communication. She helps leaders develop their style and the courage to lead authentically. Kirsten provided HR leadership to fast-paced, accelerated growth companies in wireless, high-tech and biotech prior to making the shift to working at the Bill and Melinda Gates Foundation. In each organization, she helped build HR capability and capacity, designed and implemented effective people strategies, shaped culture, and coached leaders and their teams to achieve higher performance.

Alex Zweber, CFA

Senior Portfolio Manager, Parametric

Mr. Zweber is responsible for the design and implementation of several of Parametric's Volatility Risk Premium solutions, including the Defensive Equity and Global Defensive Equity strategies. He has considerable experience with portfolio construction, trading and portfolio management across both futures and options; and he works closely with institutional clients and consultants to address their investment and risk management needs. Prior to joining Parametric in 2006*, Alex earned a B.A. in Economics from Macalester College. He is a CFA charterholder and a member of the CFA Society of Minnesota.

*Reflects the year employee was hired by The Clifton Group, which was acquired by Parametric Portfolio Associates LLC on December 31, 2012.

Jennifer Sireklove, CFA

Director of Responsible Investing, Parametric

Ms. Sireklove is responsible for all aspects of Parametric's responsible investing strategies. As the primary strategist for responsible investing, Jennifer works closely with advisors and consultants to design, develop and implement portfolio solutions that incorporate their clients' principles. Prior to joining Parametric in 2013, her career was in equity research, covering the energy, utility and industrial sectors. She earned a MBA in Finance from the University of Chicago and a B.A. in Economics from Reed College.