



Asset Allocation CIMposium

We're looking forward to welcoming you to St. Louis for an engaging and educational day with Confluence highlighting our Asset Allocation strategies.

Attendees will learn about the philosophy that guides Confluence's Asset Allocation program and methodology, followed by an update on the macroeconomic risks we're currently monitoring. We're also pleased to highlight perspectives from a former Federal Reserve president along with a panel discussion featuring fellow advisors who utilize our strategies. A Q&A portion with the Asset Allocation Committee will close out the afternoon.

November 14, 2023 | St. Louis, Missouri

Location: Le Méridien | Grande Salle

7730 Bonhomme Ave, St. Louis, MO 63105

Monday, November 13, 2023

- ◆ 6:00pm – 9:00pm CT: Welcome Reception at Le Méridien | *Foyer of the Grand Salle & The Chalet*
Hosted by the Confluence Sales & Asset Allocation teams.

Tuesday, November 14, 2023 | 8:00am - 3:00pm CT

- ◆ 7:30am: Doors Open | Breakfast provided
- ◆ 8:30am: CIMposium kickoff: A Conversation with Mark Keller, CFA
- ◆ 9:00am: Confluence's Approach to Asset Allocation: Accounting for Risk | *Greg Ellston & Dave Miyazaki, CFA*
- ◆ 9:50am: Break
- ◆ 10:00am: A Preview of 2024: The Slow-Bicycle Economy | *Patrick Fearon-Hernandez, CFA*
- ◆ 10:50am: Break
- ◆ 11:00am: Panel Discussion with Fellow Advisors
- ◆ 12:00pm: Buffet Lunch
- ◆ 12:45pm: Perspectives on the Federal Reserve | *Gary Stern, former president of the Federal Reserve Bank of Minneapolis*
- ◆ 1:30pm: Break
- ◆ 1:45pm: Q&A with the Confluence Asset Allocation Committee

[Click Here](#) for event page/agenda on Confluence website | *password (case sensitive): cim2023*