

9TH ANNUAL STRATEGIC INVESTMENT SYMPOSIUM

SPONSORSHIP OPPORTUNITIES



COLLEGE *of*
CHARLESTON

SCHOOL OF BUSINESS
INVESTMENT PROGRAM

Hosted by the School of
Business Investment Program

Friday, February 24, 2023
The Francis Marion Hotel
Charleston, South Carolina

STRATEGIC INVESTMENT SYMPOSIUM



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9TH ANNUAL STRATEGIC INVESTMENT SYMPOSIUM SINCE 2015:

- **1,400+ Participants**
- **190+ Industry-leading speakers and panelists**
- **250+ Firms, organizations and colleges represented by attendees**

WORLD-CLASS SPEAKERS HAVE INCLUDED:

- Dr. David Kelly, Chief Global Strategist, J.P. Morgan Asset Management
- Kristina Hooper, Chief Global Market Strategist, Invesco US
- John Stoltzfus, Chief Investment Strategist, Oppenheimer Asset Management
- Dr. Katrina Sherrerd, Former CEO, Research Affiliates
- Mason Hawkins, Chairman and CEO, Southeastern Asset Management
- Charles Brandes, Founder and Chairman, Brandes Investment Partners
- Lauren Templeton, Founder and President, Templeton & Phillips Capital Management, LLC
- Larry Adam, Chief Investment Officer, Raymond James
- Jack Albin, Founding Partner and CIO, Cresset

The Strategic Investment Symposium is the preeminent event of its kind in the Southeast. Sponsors will have a unique opportunity to:

- Interact with financial professionals, financial advisors, asset managers, and high net worth individuals from 20+ states.
- Participate in dynamic discussions about cutting-edge investment strategies and issues impacting the investment world.
- Interact with fellow investment professionals, distinguished College of Charleston School of Business faculty, and select students.
- Learn how the Investment Program at the College of Charleston is preparing students for careers in investment management and how your organization can support and benefit from this resource.
- Enjoy the extraordinary beauty and charm of historic Charleston.

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ATTENDEES HAVE INCLUDED REPRESENTATIVES FROM:

Goldman Sachs • UBS • Wells Fargo • Raymond James • PNC
World Bank • Blackstone Group • Bank of America • Blackbaud • NASDAQ
Bloomberg • Greenwood Capital • Bison Wealth • US Trust
Merrill Lynch • Truist • Northern Trust Asset Management • J.P. Morgan
PWC • CFA Institute • The Hartford Funds • Tandem Investment Advisors
KKR • Allstate • Capasso Planning Partners • Dixon Hughes Goodman
Invesco • First Citizens • TPG Capital • Northwestern Mutual
Frontier Capital • Greystar • Southeastern Asset Management
Weiss Multi-Strategy Advisers • Mutual of Omaha

PREVIOUS SPONSORS INCLUDE:



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Our benchmark is the investor.®



To accommodate growing attendance, the Symposium will be hosted for the second time in the beautiful, historic Francis Marion Hotel. This off-campus location accommodates large group sessions, breakout sessions, meals, and networking in one comfortable setting. The hotel is located in the heart of downtown Charleston on King Street, only two blocks from the College of Charleston campus.

A networking lunch will facilitate discussion among attendees, sponsors, and speakers. The second annual Speakers & Sponsors Dinner will be held the evening before the Symposium, Thursday, February 23rd, for speakers, sponsors, and select students.

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Platinum Sponsorship – \$10,000

- Named Sponsor for the Global Markets Outlook session, Investment Strategies session, Speakers & Sponsors Dinner, or Closing Reception
- 8 tickets to the Symposium
- 4 tickets to the Speakers & Sponsors Dinner
- Reserved prominent space to present firm materials and engage with attendees during breaks

Gold Sponsorship – \$5,000

- Named Sponsor for one of the 6 breakout sessions
- 6 tickets to the Symposium
- 2 tickets to the Speakers & Sponsors Dinner
- Prominent space to present firm materials and engage with attendees during breaks

Silver Sponsorship – \$2,500

- 4 tickets to the Symposium
- 2 tickets to the Speakers & Sponsors Dinner
- Space to present firm materials and engage with attendees during breaks

Bronze Sponsorship – \$1,000

- 2 tickets to the Symposium
- 2 tickets to the Speakers & Sponsors Dinner

Friends of the Investment Program – \$500

- 1 ticket to the Symposium
- 1 ticket to the Speakers & Sponsors Dinner

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8:30 - 9:15	REGISTRATION WITH MEET & GREET
9:15 - 9:30	WELCOME Dr. Mark Pyles, Professor of Finance, Director of School of Business Investment Program
9:30 - 10:45	GLOBAL MARKETS OUTLOOK
11:00 - 12:15	INVESTMENT STRATEGIES
12:15 - 1:15	LUNCH
1:30 - 2:30	BREAKOUT SESSIONS ONE: CHOOSE YOUR SESSION PORTFOLIO CONSTRUCTION IN AN INCREASINGLY COMPLICATED MATRIX WATCH OUT FOR THE WAVES: THEMATIC INVESTING THIS ISN'T YOUR PARENTS' WEALTH MANAGEMENT INDUSTRY
2:30 - 2:45	BREAK & NETWORKING
2:45 - 3:45	BREAKOUT SESSIONS TWO: CHOOSE YOUR SESSION PRODUCTS VS. THE INGREDIENTS ALTERNATIVES TO THE NORM THE MAZE OF POLITICS, GOVERNMENTS, AND FIXED INCOME
4:00 - 5:00	COCKTAIL RECEPTION

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Questions may be directed to:

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