

## **“Invested in Her: How Advisors Can Better Serve Women Investors”**

The Seagate Hotel & Spa  
1000 E. Atlantic Ave  
Delray Beach, FL 33483  
Meeting Room: Reef Ballroom



### **Tuesday, June 16th**

2:00pm	Conference Registration Opens	
2:30-2:45pm	Welcome Remarks	
2:50-3:30pm	<b><i>“Sponsor Pannel Discussion”</i></b> <i>Moderated by Chris Yarosh</i>	
3:40-4:20pm	<b><i>“Say This Not That: A Practical Guide to Communicating Effectively with Women and Couples Across Generations”</i></b> By <b><i>Guaranty Income Life Insurance Company</i></b>	
4:20-5:00pm	<b><i>“CIRE Equity &amp; First Trust   A Private Real Estate Investment Built for Tax-Efficient Growth”</i></b> By <b><i>Ben Hilgers, Director of Investor Relations, CIRE Equity and Ronnie Muck, National Accounts, First Trust Portfolios</i></b>  <p>In a market crowded with complex, layered fund structures, CIRE Equity takes a different approach — direct ownership of institutional-quality real estate designed to generate tax-advantaged income and long-term appreciation. In partnership with First Trust, we're bringing this evergreen private real estate strategy to financial advisors and their clients who demand transparency, durability, and results.</p>	
6:00-6:30pm	Cocktail Reception	Beach Club Upper DR
6:30pm-8:30pm	Networking Dinner	Beach Club Upper DR

### **Wednesday, June 17th**

7:45-8:30am	Networking Breakfast	
8:40-9:20am	<b><i>“Corebridge Action Planner Series for Women”</i></b> by <b><i>Joe Cavalieri, Divisional V.P., Corebridge Financial</i></b>  <p>While women are gaining financial power and now control about one-third of total household financial assets in the US, they are still experiencing specific challenges, like outliving their spouse, greater health and long-term care costs.</p> <p>This presentation in the Action Planner series digs into the obstacles and opportunities that may lie ahead, We will discuss things like saving, investing and preparing for the future. It offers key insights, ideas and actions steps to help women get to where they want to go.</p>	

- 9:20-10:00am ***“Marketing Services & Women’s Events: Strategies That Connect”*** By Michael Bacchus, Divisional Vice President – Advanced Annuity Sales, **TruChoice Financial Group**
- This presentation focuses on helping advisors engage and grow their female client base through targeted Social Security seminars, meaningful client appreciation events, and community-driven charitable initiatives. It also highlights the importance of strengthening your brand through social media and AI-driven strategies, with an emphasis on SEO and AIEO to increase visibility and attract the right audience.
- 10:15-10:55am ***“Positioning Your Practice to Serve More Women”*** by Roberta Eckert, NRI Team, Nationwide
- 11:00-11:30am ***“Capturing & Retaining Assets”***  
By Christina Bilenler, Enterprise Business Consultant, **AssetMark**
- Over 80% of investors indicate they plan to transfer wealth to loved ones, but less than half of those have a plan in place to do so. Additionally, many advisors are facing the harsh reality that they have an aging client base and very little interaction with the next generation. Within this session we share generational trends, ways to engage the next generation and review the importance of preparing families for the inevitable transfer of wealth.  
**Resource:** Family Preparedness Planning Guide
- 11:30am-12:30pm Lunch
- 12:40-1:20pm ***“New Product Spotlight”***
- 1:20-2:00pm ***“Orion”***