This March, your peers met in Newport Beach to discuss:

**Geopolitical Environment Implications of Portfolio Construction and Asset Allocation**

- Considering the impact of geopolitical events in the South China Sea on asset allocation and the long-term investment impact.
- Exploring the potential impact of the rise in populism on future portfolio construction.
- Responding to increased volatility by focusing at a country, rather than regional, level for asset allocation.

**Investment Strategy**

- Determining the implications of impact investing and the fiduciary effects of offering these funds to clients.
- Understanding how labor productivity and growth is being measured in the wake of technology implementation.
- Exploring the implications of technology on the labor market and long-term investments.

**Investment Alpha or Client Alpha: How Do You Define Your Value?**

- Demonstrating the firm’s unique, holistic value to retain existing clients and to acquire new ones.
- Providing a consistent client experience across platforms and among staff aligned to the firm’s value proposition.
- Developing and hiring talent to provide a high-quality client experience that reiterates the firm’s value enabling clients to reach their financial goals.

**Technology Roadmap**

- Building the capabilities to provide information to clients to give them a clear understanding of their performance.
- Upgrading core systems and investment platforms to enable new capabilities in the future and to work well with existing systems.
- Considering where to best allocate technology investments to remain competitive.