

Advisory Board 2021

The Ritz Carlton - Dallas, Texas – November 18th, 2021

Wednesday, November 17th, 2021

All Day	Arrivals	Hotel Check-in - The Ritz Carton Dallas 2121 McKinney Ave, Dallas TX 75201
6:30 PM	Dinner	Del Frisco's Double Eagle Chophouse 2323 Olive St., Dallas TX 75201

Thursday, November 18th, 2021 – The Cedar Room

7:30 AM	8:00 AM	Breakfast in The Cedar Room
8:00 AM	8:30 AM	Welcome - Set Agenda
8:30 AM	9:15 AM	Blackcreek - Industrial REIT
9:15 AM	10:00 AM	Oakhurst - Defined Outcome Solutions
10:00 AM	10:15 AM	Break
10:15 AM	11:00 AM	RS Model Overview - Managed Volatility Series
11:00 AM	11:45 AM	Performance Reporting - Monthly Statements
11:45 AM	1:00 PM	Lunch in The Cedar Room
1:00 PM	1:30 PM	Pricing Discussion - Monthly Tech Fee Changes
1:30 PM	3:00 PM	Service Model Discussion
3:00 PM	3:30 PM	Wrap-up: Follow up Items for Next Advisory Board Meeting
6:00 PM		Meet in Lobby to Walk to American Airlines Center
7:00 PM	Concert	Suite at Luke Combs, Ashley McBryde & Ray Fulcher Concert American Airlines Center, 2500 Victory Ave, Dallas, TX 75219

Friday, November 19th, 2021

All Day	Departures	No Scheduled Meetings
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