

**8-18 September
2024**

Boston
8-10 September 2024

New York City
11-13 September 2024

Los Angeles: Future Proof
15-18 September 2024

The Inside Network

INUSA

STUDY TOUR

Overview

The Inside Network's USA Study Tour will focus on the most important and pressing issues for advisers from both an investment and client experience perspective.

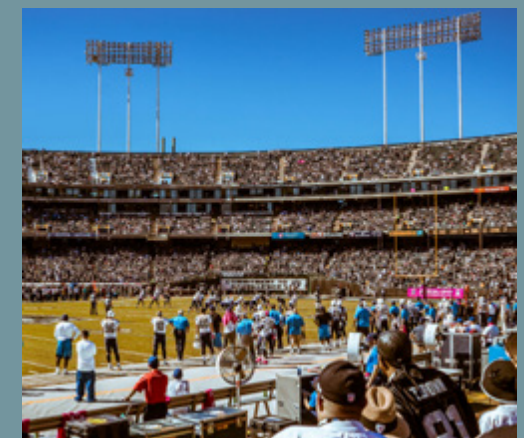
Visiting both Boston, New York and LA over nine days, The Inside Network welcomes an exclusive delegation of advisers who will meet academics, portfolio managers, CEO's, technology platforms and local US advisers, in an effort to bring unique learnings back to their own businesses.

WHY ATTEND?

The IN USA Study Tour offers a unique opportunity to network with other industry leaders, but more importantly, to find an edge both in investments and your practice. Boston is the home of several of the world's leading universities and the city in which many of the largest specialist investment managers of the world began. Similarly, New York stands out as the centre of ambition and pursuit of success at all costs. Splitting time between US advice practices, investment managers and tech companies, the Study Tour will offer big picture investment insights, academic analysis and an opportunity to consider the pathway for financial advice in Australia over the next decade.

HIGHLIGHTS

- IN Boston | Practice Growth Summit & IN NYC | Future Wealth Summit
- Guided tour of MIT University
- Guided Wall Street Insiders Tour
- Harvard leadership short course
- Hosted dinners and cocktail functions
- Sport events including a baseball and NFL game
- Future Proof festival



IN Boston

8-10 September 2024

The first destination of the IN USA Study Tour is Boston, home to Harvard, MIT and more leading universities than almost any other city in the world.

Not only is the city known for its academic and educational excellence, many of the largest and most success investment managers in the world were founded in its leafy streets.

Culminating with a visit to Harvard University, your time in Boston will be committed to both big picture thinking, as we seek to understand the implications of the surge in AI and computing power we are seeing today, along with a deep dive into the scientific and mathematic side of investing. The aim being to equip advisers with the tools to both position portfolios for the long-term, but also understand the short-term drivers of returns.



IN New York

11-13 September 2024

The second destination is New York, long considered the home of capitalism.

Home to many of the world's largest private equity and hedge funds, the city is all about the 'deal' and the pursuit of alpha or outperformance. Similarly, New York is home to the country's most successful and progressive advice firms.

Culminating with a summit dedicated solely to 'alternative' assets the stop in New York will include access to the leading thinkers and decision makers from the globally renowned private markets firms, including both credit, equity and real assets, and insights not only into the current position of the global economy and industry, but rather where it is heading from here and how you should be positioned.



IN Los Angeles

15-17 September 2024

And finally, the study tour will join a delegation from Australia to attend the fastest growing wealth conference in the US, Future Proof.

Over the three days of the event, you will have access to the fastest growing wealth management groups, hearing directly from them, covering everything from sales techniques, managing high performance team, marketing, the roles of asset consultants along with meeting some unique investment firms.



Schedule: Boston & New York

8-14 September 2024

Boston

New York

	Sun 8 Sept	Mon 9 Sept	Tues 10 Sept	Wed 11 Sept	Thurs 12 Sept	Fri 13 Sept	Sat 14 Sept
Breakfast	Breakfast and leisure time	Breakfast and leisure time	Breakfast and leisure time	Industry breakfast	Breakfast and leisure time	Breakfast and session	Leisure time
AM		Industry engagement	IN Boston: Future Wealth Summit	Travel Boston > NYC via train	IN NYC: Alternatives Summit		
Lunch	Welcome to the IN USA Study Tour: Lunch and walking tour	Lunch and learn and Harvard site visit				Lunch and learn	
PM							
PM	Industry engagement			Leisure time and check-in		Leisure time	
Dinner	Welcome dinner	Group dinner	IN event: Baseball match	Wall Street Insider Tour	Group dinner	IN event: Cocktail dinner	

Key: Leisure time IN events Industry events IN Summit Travel

Schedule: Los Angeles

15-17 September 2024

Future Proof

	Sun 15 Sept	Mon 16 Sept	Tues 17 Sept
Breakfast	Breakfast and leisure time	Rethinking Advisor Marketing	Commercial Real Estate: Boom or Bust with Cadre & PIMCO
AM	Travel NYC > LA via plane	Industry engagement	What Clients Want From Their Advisor
Lunch		A US-China Relations with Former U.S. Ambassador David Adelma	How to Invest in the New Era of AI-Enabled and Data-Driven Medicine
PM	Sporting event: NFL	Lessons on Growth with Shirl Penney & 3 Fast-Growing RIA CEOs	Industry engagement
PM		Unveiling the Latest WealthTech Tools	Surviving & Thriving w/ Betterment, Morningstar, and Apex Fintech
Dinner	Welcome drinks: Future Proof	Group dinner	Farewell group dinner: Future Proof

Key: Leisure time Travel IN events Future Proof Industry events

Pricing

STUDY TOUR INCLUSIONS

- 3 nights' accommodation in Boston
- 4 nights' accommodation in NYC
- 2 x IN educational summits (1 x Boston & 1 NYC)
- Meet with senior leaders of the US industry
- Guided tour of MIT University, Boston
- Harvard leadership course (half-day)
- Internal transfers – including train from Boston > NYC.
- All food & beverage for the duration of the Study Tour (excluding leisure time)
- The Inside Network cocktail function – Friday 13 September
- Optional group activities including – Wall Street Insiders Tour, 9/11 Memorial, Red Sox baseball and NFL match.

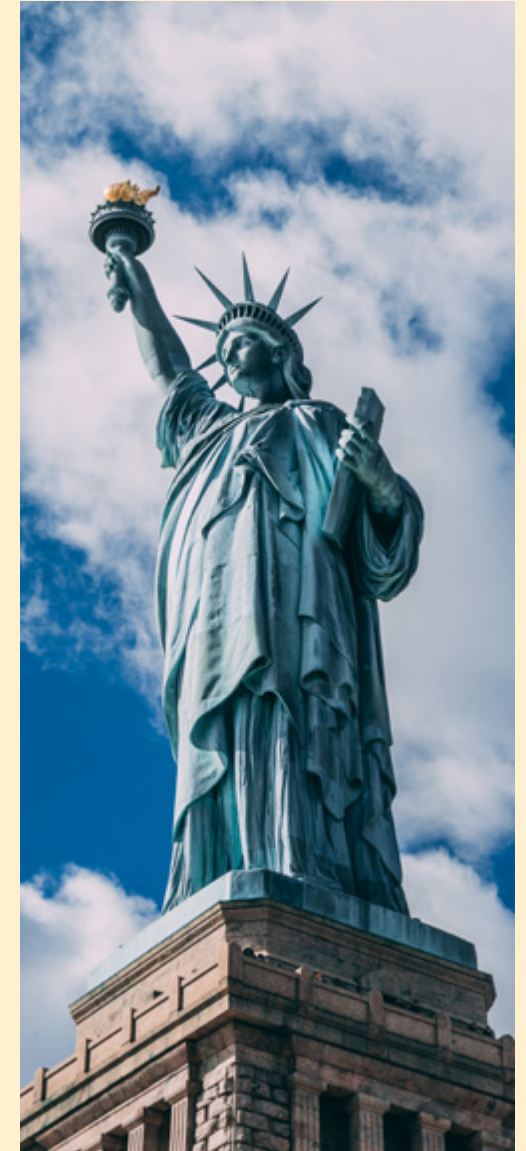
FUTURE PROOF INCLUSIONS

- 3 nights' accommodation in LA
- Future Proof festival ticket – access to all sessions
- Internal transfers – including flight from NYC > LA.
- All food & beverage for group dinners (excluding leisure time)
- The Inside Network farewell dinner – Tuesday 17 September

insiders members AUD\$11,000

Non-members AUD\$20,000

Return flights from Australia to the US are at your own expense and can be arranged directly or through The Inside Network's appointed travel agent.



CONTACT

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