



March 13, 2020

To: Our TII Community, Members, Speakers, Sponsors & Editorial Committee  
From: The Investment Institute, LLC (Andrea Szigethy & Donna Holly)

We are thinking of all of you and hope, as always but particularly at this time, that all is well with you, your families, your friends, and your colleagues. We are so appreciative of the loyalty and trust that you have all placed in The Investment Institute since the founding of our firm and, recognizing the ongoing and increased uncertainty that COVID-19 is causing around the world, our highest priority is the health and well-being of everyone in our community. With that in mind, we wanted to be in touch as soon as possible to let you know **we have cancelled *The Spring Investment Institute Forum* scheduled to take place this May 18-19, 2020 at The Carolina Inn in Chapel Hill, NC.** While we know it's the right thing to do, we hate that we will be missing the chance to see all of you in person and to have the chance to hash out together everything that's happening in the world around us.

We thought about postponing and rescheduling our Spring Forum but, with so many unknowns with this virus as well as an abundance of other firms working to reschedule their meetings for the summer, we didn't think it would be in the best interest of our members for us to add yet another event to what are likely already-overscheduled calendars. Instead, we have made the decision to move forward, with the help of our Editorial Committee, to develop the agenda and speaker faculty for our **Fall Forum (scheduled for October 26-27, 2020 at The St. Regis Hotel in Atlanta, GA)** with some of the same keynotes and speakers from this cancelled program. We have already confirmed Frank Abagnale, Angela Lee and have a tentative confirm from Campbell Harvey for the Fall Forum and are in the process of reaching out to others. We will also be adding some new topics and speakers to address some of the changes in the world we have encountered in just the last few days and which we will likely experience over the next few months. It is our hope that if things calm down a little, our Fall Forum will be a place where our community can all come back together to talk through and share ideas with one another on so many new issues that will affect our day-to-day lives and our investment portfolios going forward. We are committed to working hard to incorporate more time for smaller group discussions to complement our traditional conference format of keynote sessions and topical panel discussions. ***Be on the lookout in the coming weeks for an email with a link to register for the Fall Forum.***

Below are the plans we have put into place regarding the Spring Forum event cancellation:

#### **TII MEMBERSHIP**

While we hope the notes below will answer the questions that you have and that they align with your thoughts on how best for us to handle, please feel free to contact us with any questions and concerns. We so very much value our relationships with each of you and want to work together to ensure we are dealing with the current situation in the best way possible for everyone. ***As each annual membership includes passes to a Spring (May) and Fall (October) forum, we will make the following adjustments to ensure each of your firms still has passes to two events.*** If for any reason you are unable to attend our upcoming forum's dates, please let us know and we will figure out another plan.

#### **Organizations that joined TII Membership prior to the Fall Forum/October 2019**

- The membership that you purchased included passes to both our Fall/October 2019 forum as well as the now-cancelled Spring/May 2020 forum.
- **We have automatically adjusted your membership so that it now includes our upcoming Fall Forum (scheduled for October 26-27, 2020 at The St. Regis Hotel in Atlanta, GA)**

#### **Organizations that joined TII Membership prior to the Spring Forum/May 2020**

- The membership that you purchased included passes to both our now-cancelled Spring/May 2020 forum as well as the upcoming October 26-27, 2020 Fall Forum at The St. Regis, Atlanta, GA.
- **We have automatically adjusted your membership so that it now includes our upcoming Spring Forum (scheduled for May 17-18, 2021 at The Grove Park Inn, Asheville, NC – tentative dates & venue are currently being held)**

## **HOTEL CANCELLATIONS**

We understand that most of you will no longer need the hotel reservations you may have already booked at The Carolina Inn (our now-canceled forum venue) and we will therefore cancel any reservations still in our hotel room block after **Wednesday, March 18<sup>th</sup>**. If you prefer to cancel your reservation on your own or would like to keep your reservation intact, please see the options noted below. If you are not sure whether or not you booked a hotel room yet, please contact The Carolina Inn at 800.962.8519 to be sure.

- ***To cancel your hotel room reservation(s):***
  - You can cancel your reservation by using the “Cancel” button in The Carolina Inn hotel confirmation email you should have received from the hotel at the time of your booking.
  - You can also cancel your reservation by contacting The Carolina Inn at 800.962.8519 and canceling directly with the hotel over the phone.
  - If you want your room to be cancelled but do not want to handle the cancellation, we will cancel your room for you after Wednesday, March 18<sup>th</sup> and you can reach out to the hotel directly if you do not receive an email with your cancellation confirmation.
- ***To keep your hotel room reservations(s):***
  - If you would like to keep your hotel reservation at The Carolina Inn for other work or personal reasons, please let us know by Wednesday, March 18<sup>th</sup> so that we can ensure your reservation is kept intact and not canceled along with the rest.
- ***Did you book a hotel room at another hotel?***
  - Please don't forget to cancel any hotel reservations you may have made at another hotel!

## **NEW DIGITAL RESOURCE LIBRARY ON TII'S WEBSITE & APP – PLEASE SEND ANY MATERIALS YOU WOULD LIKE TO SHARE WITH TII'S COMMUNITY!**

With so many restricted travel policies now put into place, our members may or may not have more time on their hands to read books, review presentations, listen to podcasts, watch webinars, take more phone calls ☎, etc. In some instances a few of you might start getting a little stir-crazy since many of us are used to a heavy travel schedule. We thought now might be a great time to update the educational resources section on our website and app. If anyone would like to share educational presentations, investment research, white papers, their favorite books and podcasts or any type of educational resource (**please NO marketing materials**) that you are using internally or distributing to clients (including anything specific regarding COVID-19 and how it is affecting your organizations in terms of policies and procedures and/or investments and strategies in your portfolios), we encourage you to send us a PDF version as soon as possible. We can then host all of these research pieces on both our website and our app and have a hub where everyone can access these materials.

We are actively discussing different ways to continue to connect during this uncertain time and we would very much welcome any of your ideas on how we may be helpful to you and to the community in general as we navigate a very uncharted course. We are working hard to come up with some new and innovative ways to bring our investor and manager community together in smaller formats in the future (face-to-face as well as through online technology). We promise to do our best to think creatively and do everything possible to keep the friendships alive that we've forged with one another over these past few years together. We feel so fortunate to have you all as friends and appreciate the trust and support that you give to us!

We await the day when we can all meet up again in person but, until then, we wish you, our dear community of friends, everything safe, healthy and happy for you and all of those around you.

Warmest regards and thanks,

Andrea & Donna

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