

Investment Forum Evaluation Form

February 2 – 4, 2026 | Marriott Harbor Beach | Fort Lauderdale, FL

Name: _____

Email: _____ Phone: _____

Thank you for attending. Please take a moment to complete this survey. Your feedback is important to us.

I am interested in learning more about Touchstone Investments (check all that apply):

- US Equity Strategies
 International Developed Markets Equity Strategies
 Emerging Markets Equity Strategies
 Fixed Income Strategies
 Sustainable Investing

Comments / Specific Style Box: _____

Practice Consulting Topics of Interest:

- | | |
|--|--|
| <input type="checkbox"/> Growing AUM and Revenues | <input type="checkbox"/> 3 Lens Portfolio Review |
| <input type="checkbox"/> Client Acquisition | <input type="checkbox"/> Portfolio Construction & Analysis Tools |
| <input type="checkbox"/> Diagnostic Practice Review | <input type="checkbox"/> Multi-Generational Wealth |
| <input type="checkbox"/> Team Structure - Roles and Responsibilities | <input type="checkbox"/> Touchstone Asset Allocation (TAAC) |
| <input type="checkbox"/> Client Segmentation and Service | <input type="checkbox"/> Active Share Offerings & Education |
| <input type="checkbox"/> Pricing | <input type="checkbox"/> Other _____ |

Please include any additional comments or suggestions:

Circle your level of satisfaction for each:

	Poor		Average		Excellent
Overall Meeting Satisfaction	1	2	3	4	5
Date/Time/Location	1	2	3	4	5
Length of Meeting	1	2	3	4	5
Meeting Content and Presenters:					
Improving Active Manager Selection & Implementing Scalable Investment Review	1	2	3	4	5
Sands Capital	1	2	3	4	5
Fort Washington Investment Advisors	1	2	3	4	5
Rockefeller Asset Management	1	2	3	4	5
Los Angeles Capital	1	2	3	4	5
Building and Operating Extraordinary Teams	1	2	3	4	5
Ares Capital Management	1	2	3	4	5
Market Takeaways and Forward Thinking	1	2	3	4	5

Comments on Speakers/Content:

Follow Up Meeting Preferences:

Day of Week: M T W TH F

Location: _____