



Masters 2024 Frequently Asked Questions

As of 10-13-23 | Subject to Change

CONFERENCE DATES

1. **What are the dates of Masters?**
 - a. Wave 1: March 6-9, 2024
 - b. Wave 2: March 9-12, 2024

CONFERENCE BENEFITS

1. **I qualified for Masters. What benefits do I receive?**
 - a. Masters qualifiers receive the following benefits:
 - Complimentary registration for you and one guest.
 - Complimentary round-trip, economy airfare* for you and one guest.
 - Complimentary airport transfers to/from Southwest Florida International Airport (RSW).
 - Complimentary accommodations for three nights at the JW Marriott Marco Island Beach Resort.

*Complimentary roundtrip, economy airfare based on lowest, logical route. Direct flights are not guaranteed.

HOTEL

1. **Where am I staying?**

JW Marriott Marco Island Beach Resort
400 South Collier Boulevard, Marco Island, Florida, 34145
Phone: (239) 394-2511
[Hotel Website](#)
2. **What time can I check-in and check-out?**
 - a. JW Marriott Marco Island Beach Resort check-in time is 4:00 p.m. Check-out time is 11:00 a.m.
3. **I want to extend my stay. How much will this cost me?**
 - a. The group room rate starts at \$449 (based on room type) plus applicable taxes per night and based on hotel availability. The group room rate can be applied up to three nights before Wave 1 (March 6-9) and three nights after Wave 2 (March 9-12). **Please note:** Extension requests for Wave 1 can only be made for pre-conference dates (post-conference nights not available); extension requests for Wave 2 can only be made for post-conference dates (pre-conference nights not available).
 - b. All extension requests depend upon hotel availability.

- c. Any special room type requests made for extensions (i.e. room upgrades) may affect the type of room that is reserved for you during the conference. You are responsible for any variance in cost if the room type selected for your extension is more expensive than the room blocked during our conference.
- d. Do NOT reserve extensions directly with the JW Marriott Marco Island Beach Resort. Please work with LPL Financial Travel Headquarters on these arrangements so we can ensure your reservation is seamless and you are extended the group rate if available.

4. I am traveling with friends and/or family. How many people can stay in my room?

- a. The maximum number of guests per room is (4) four.
- b. Only one hotel room per qualifier family is allowed.
- c. Cribs are \$15 and rollaway beds are \$25; based on availability.

5. I need to cancel my hotel reservation. What is the hotel cancellation policy?

- a. If you need to cancel your hotel reservation, including extensions and additional rooms, you must provide written notice of cancellation to LPL Financial Travel Headquarters at LPLFinancialMasters@TravelHQ.com 72 hours prior to check-in; otherwise, you may be charged a cancellation fee by the hotel equal to one night's room and tax.
- b. If you do not arrive at the hotel on your scheduled arrival date and you do not provide notice to LPL Financial Travel Headquarters, your room may be cancelled and released by the hotel and accommodations may not be made available again.

TRAVEL

1. How do I book my flights?

- a. You and your complimentary guest must book your flights through LPL Financial Travel Headquarters. When you register for Masters 2024, you will provide your preferred travel dates, major airport closest to your home, and seat preferences. Once your registration is complete, LPL Financial Travel Headquarters will begin making your flight arrangements.
- b. The last day to book your and/or your complimentary guest's flight is:
 - Friday, February 9, 2024

2. I completed my registration. When do I get my flight confirmation?

- a. You must approve the tentative flight itinerary sent to you via e-mail before your flight reservations are booked. Be sure to carefully review the itinerary prior to approving it and contact LPL Financial Travel Headquarters with any discrepancies or changes. If not approved within 24 hours, the air reservation will be not be ticketed.
- b. Airfares are subject to change without notice. Any airfares quoted cannot be guaranteed until you have approved your itinerary.
- c. After you approve your itinerary, you will receive a final travel itinerary via email. Please print your final travel itinerary and retain copies for your records. You will need to take these details with you to check in at the airport.

3. I need to change my flight. Does LPL Financial pay for this?

- a. Any costs associated with ticket changes will be your responsibility. LPL Financial Travel Headquarters will also charge a non-refundable \$65 transaction fee for any airline ticket changes.

4. I am bringing additional guests to Masters. How do I book their flights?

- a. You can book your additional guests' airfare through LPL Financial Travel Headquarters for a fee of \$65 per ticket, or you can book these flights on your own. Airfare for additional guests, beyond your one complimentary guest, is at your expense.
- b. If choosing to book additional guest airline tickets through another source, please advise LPL Financial Travel Headquarters of those travel itineraries to ensure proper transportation is provided for you and your guests on main arrival and departure days.

5. Will LPL Financial reimburse me for my checked bag?

- a. LPL Financial does not reimburse for checked luggage fees. We suggest including your name and mobile number on all bags, including carry-on luggage.

6. How can I upgrade my airline seats?

- a. LPL Financial Travel Headquarters can issue your ticket in your requested fare class, if available. However, you will be responsible for any costs above a standard economy class ticket.
- b. Or, LPL Financial Travel Headquarters can issue your ticket in economy class. You can contact the airline directly to request an upgrade with frequent flyer miles.

7. Does LPL Financial cover transfers from the airport to the hotel?

- a. Complimentary airport transfers will be provided for all registered attendees between Southwest Florida International Airport (RSW) and the JW Marriott Marco Island Beach Resort on main arrival and main departure days only. You are responsible for transportation if you arrive or depart out of these main travel dates.

GUESTS AT MASTERS

1. What is the cost to bring additional guests to Masters 2024?

REGISTRATION FEES FOR ADDITIONAL ADULT GUESTS (AGES 18+) & CHILDREN (AGES 11-17)	
Prices	Program Inclusions
\$550 Adult (18+)	<ul style="list-style-type: none"> Airport transfers on main arrival and departure days Welcome Reception on: <ul style="list-style-type: none"> Wave 1: Wednesday, March 6, 2024 Wave 2: Saturday, March 9, 2024 Hosted breakfast daily on program dates Hosted lunch on program dates Final Night Reception on: <ul style="list-style-type: none"> Wave 1: Friday, March 8, 2024 Wave 2: Monday, March 11, 2024 Roundtrip portorage and room attendant fees for three nights (qualifier's room only)
\$350 Child (11-17)	
Child (0-10): Complimentary	

2. Does LPL Financial cover the airfare for my additional guests?

- a. LPL Financial will pay for your complimentary guest's airfare. If you bring additional guests, you will be responsible for their airfare.

3. I'm not sure if my guest will be joining me at this time. Can I add a guest later?

- a. You are able to register a guest at a later date. Contact LPL Financial Travel Headquarters at LPLFinancialMasters@TravelHQ.com to add a guest to your registration.

4. I'm bringing a guest to Masters but they aren't attending conference functions. Do I have to register them?

- a. If you plan to bring additional guests to Masters to simply enjoy the destination and not participate in the conference, it is not necessary to register them. Please note, non-registered guests will NOT receive a name badge, nor have access to any conference functions, including meals, receptions, sessions, and the hospitality lounge.

ATTIRE, WEATHER, & TIMEZONE

1. What should I wear?

- a. Business casual is appropriate for all business sessions. Resort attire is appropriate for daytime and evening activities.

2. What is the weather like?

- a. Average temperatures for Marco Island, Florida: March temperatures range from daytime highs in the high 70's to evening lows in the high 50's.
- b. For up-to-date weather information shortly prior to your departure, please visit <https://weather.com>.

3. What time is it?

- a. In March during the Masters 2024, Marco Island will operate on Eastern Standard Time. Therefore, the time difference will be as follows:

San Diego	Denver	Austin	Marco Island
9:00 a.m.	10:00 a.m.	11:00 a.m.	12:00 p.m.

RULES & REGULATIONS

1. FINRA Regulation

- a. LPL Financial is required to report to FINRA that Masters 2024 is a working meeting and an established program. Hotel and air benefits are to be used within the conference dates only. If LPL Financial provides benefits outside of these parameters, it potentially puts the program at risk.

2. IRS Reporting Requirements

- a. In accordance with IRS reporting requirements, all non-business-related benefits provided by LPL Financial for the benefit of our financial advisors are required to be reported as income to them on their 1099-MISC forms.
- b. Examples of other non-business-related benefits include, but are not limited to, airfare provided by LPL to spouses, guests, or children who have no business purpose in attending a conference, as well as airline or train tickets booked through the LPL Financial official travel partner for a qualifying program but not used for that particular program.
- c. If an airline or train ticket booked through the LPL Financial official travel partner is not used by a qualifier due to registration cancellation, the value of the ticket will be reported as income on his or her 1099-MISC at the end of the year.
- d. If guest airfare is ticketed but not used for Masters (i.e., due to cancellation), the qualifier still will have the value of the guest airfare reported as income on his or her 1099-MISC at the end of the year.

- e. LPL Financial only covers room and tax for designated nights within official program dates. If benefit nights are applied before or after official program dates, the qualifier is subject to having the value of those benefit nights reported as income on his or her 1099-MISC at the end of the year.

CONFERENCE CANCELLATION

1. I need to cancel. How do I complete this request?

- a. Cancellations must occur by 11:59 p.m. CT on **Monday, February 26**
- b. Conference cancellations must occur, in writing, to LPLFinancialMasters@TravelHQ.com
- c. If you have conference benefits that include airfare and tickets have been issued in your name, you will receive a 1099 in January 2025 for the value of the ticket. The ticket will remain in your name for future use. Change fees may apply depending on the airline. Please check with LPL Financial Travel Headquarters and the airline for rules around reusing the ticket(s).
- d. No-show fee is applicable to all registrants, including qualifiers.

2. I cancelled my attendance to Masters. Do I still need to cancel my flight?

- a. Yes. You must email LPL Financial Travel Headquarters at LPLFinancialMasters@TravelHQ.com to cancel your flight.
- b. If you or your guest booked airfare through LPL Financial Travel Headquarters and airfare was not used for Masters 2024 due to conference cancellation, the value of both airfares will be reported as income on your 1099-Misc at the end of the year. The tickets will remain in your and your guest’s name for future use. Please check with LPL Financial Travel Headquarters and the airline for rules around reusing the ticket(s).

KEY CONTACTS

I have more questions. Whom can I talk to?

Registration, Accommodations, or Travel Questions	Content or General Conference Questions	Club Level Benefits or Qualifications
LPL Financial Travel Headquarters (Maritz Global Events) 866-412-1239 LPLFinancialMasters@TravelHQ.com Monday - Friday, 9:00 a.m. - 5:30 p.m. ET	Conference Experiences Conferences@LPLFinancial.com Monday - Friday, 8:00 a.m. - 5:00 p.m. ET	IAS Advisors should contact their Relationship Manager or email LPLClubProgram@LPLFinancial.com