

---

# Quinnipiac G.A.M.E. VII Forum

## 2017 Keynote Speakers



**LISA ABRAMOWICZ**  
**Co-Host, "Bloomberg Markets"**  
**Bloomberg Radio**

Lisa Abramowicz is co-host of the "Bloomberg Markets" show on Bloomberg Radio. She is also a columnist for Bloomberg Gadfly, a fast commentary group aimed at providing insight and context to breaking news. Abramowicz covers the debt markets at Gadfly and has been writing about fixed income for more than a decade. She was formerly a senior writer at Harrison Scott Publications, where she reported on various structured products, including collateralized debt obligations and asset-backed and mortgage-backed securities, for Harrison Scott's Asset-Backed Alert publication. Abramowicz is a graduate of the University of Chicago.



**RALPH ACAMPORA, CMT**  
**Senior Managing Director**  
**Altaira Capital Partners LLP**

Ralph Acampora, CMT, is senior managing director of Altaira Capital Partners LLP and a pioneer in the development of market analytics. He has a global reputation as a market historian and a technical analyst, providing unique insights on market timing and related investment strategy issues. Acampora was previously the New York Institute of Finance's director of technical analysis studies. He taught at the institute for nearly 40 years. Before joining NYIF, he was director of technical research at Knight Equity Markets and also worked for 15 years at Prudential Equity Groups as director of technical analysis. As one of Wall Street's most respected technical analysts, he has consistently been ranked by Institutional Investor for more than 10 years. He is regularly consulted for his market opinion by the major business news networks as well as national financial publications. He is a chartered market technician (CMT), a designation he helped create.



**AL ANGRISANI**  
**Founder & CEO, TurnVest Partners LLC**  
**& Angrisani Turnarounds LLC**

Al Angrisani is a leading expert on corporate turnarounds and the former assistant U.S. secretary of labor under President Ronald Reagan, as well as an author and business media personality. His decades of experience and recognized expertise in both the private and public sector make him a sought-after, regular commentator on national news programs including CNBC, Fox Business News and Bloomberg TV. Television producers have utilized his background and knowledge of the economy and labor markets to put economic and financial data into perspective for a lay audience of business people and consumers. He was a regular commentator during the recent presidential election cycle, bringing intelligence and common sense to discussions about the economy and job market. He oversees Angrisani Turnarounds, an operator and adviser to the boards of directors of distress companies, and TurnVest Partners, which focuses on investing in public and private distressed companies. His work in the turnaround/investment world led Angrisani to develop a proprietary Value Creation Model that also served as the foundation for his book, "Win One for the Shareholders."



**DAVID ASMAN**  
**Anchor**  
**FOX Business Network**

David Asman joined FOX Business Network as an anchor in September 2007. He co-hosts "After the Bell" weekdays with Melissa Francis. Asman also serves as host of "Forbes on FOX," a weekend half-hour program on FOX News Channel. He has been with FNC since 1997, when he joined the network as a weekday anchor for "Fox News Live." In 2005, he was named head of FNC's documentary unit, where he hosted a series of investigative specials including "Global Warming: The Debate Continues" and "U.N. Blood Money," a series that examined the oil-for-food controversy. Prior to joining FNC, Asman served as The Wall Street Journal's award-winning editorial features editor. He joined the newspaper in 1983 as an editorial writer, where he edited the Manager's Journal and the Americas columns in addition to writing editorials and more than 100 articles from Latin America and elsewhere. In 1994, he was named senior editor for the paper's editorial page.



**JOHN AUGUSTINE, CFA**  
**Chief Investment Officer**  
**Huntington Bank**

John Augustine, CFA, has spent the past nearly 30 years as an investment manager, investment strategist and economic strategist for various financial institutions. In May 2014, he became the chief investment officer at Huntington Bank, headquartered in Columbus, Ohio, which has more than \$17 billion in assets under management. Previously, Augustine was with Fifth Third Bank in Cincinnati for 16 years holding various roles. He also worked with Star Banc in Ohio; Heritage Trust and Asset Management in Colorado; and IDS Financial Services in Colorado. He is a former president and board member for the Dayton Society of Financial Analysts and was a long-time adjunct professor in the graduate school at the University of Dayton. Augustine has a bachelor's degree from the Ohio State University and is a graduate of the Midwest Bankers Association Trust School. He has appeared frequently in the national media-including Fox News, CNBC and Bloomberg.



**RICHARD BERNSTEIN**  
**Chief Executive Officer**  
**Richard Bernstein Advisors LLC**

As CEO and chief investment officer of Richard Bernstein Advisors LLC, an investment firm specializing in longer-term, client-focused investments. Previously, he was head of the Investment Strategy Group at Merrill Lynch & Co., and also held positions at E.F. Hutton and Chase Econometrics/IDC. Prior to Merrill Lynch, he worked on Wall Street for more than 30 years. He is the author of "Style Investing: Unique Insight into Equity Management," and "Navigate the Noise: Investing in the New Age of Media and Hype." Bernstein was named to Institutional Investor magazine's "All-America Research Team" 18 times, and to the "First Team" 10 times. He was twice named to both Fortune magazine's "All-Star Analysts" and SmartMoney magazine's "Power 30." He earned his BA from Hamilton College and his MBA from New York University.



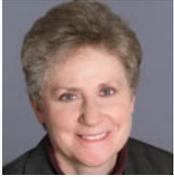
**DR. JAMES BULLARD**  
**President & CEO**  
**Federal Reserve Bank of St. Louis**

Jim Bullard is president and CEO of the Federal Reserve Bank of St. Louis. He oversees the activities of the Eighth Federal Reserve District, and participates on the Federal Open Market Committee, which meets eight times each year to set the direction of U.S. monetary policy. Bullard is a noted economist and scholar. His positions are founded on research-based thinking and an intellectual openness to new theories and explanations. He regularly engages with many audiences to discuss monetary policy and the U.S. economy. He is an honorary professor of economics at Washington University in St. Louis, and a member of the advisory council of the economics department. He is also a member of the Greater St. Louis Financial Forum, the St. Louis Regional Chamber's board of directors, the University of Missouri-St. Louis Chancellor's Council and the St. Cloud State University School of Public Affairs advisory council. He received his doctorate in economics from Indiana University in Bloomington. He has bachelor's degrees in economics and quantitative methods and information systems from St. Cloud State University in St. Cloud, Minnesota.



**MARK CASADY**  
**Former Chief Executive Officer**  
**LPL Financial**

Mark Casady retired as LPL Financial CEO in early January 2017 and as non-executive chairman of the board in early March. He guided LPL to become a leading financial services organization that serves independent financial advisers, banks and credit unions and provides clearing services to broker/dealers at financial services companies. Before joining LPL Financial in 2002, Casady was managing director of the mutual fund group for Deutsche Asset Management, Americas-formerly Scudder Investments. He joined Scudder in 1994 and held roles as managing director, head of the global mutual fund group, and head of defined contribution services; he was also a member of the Scudder, Stevens, & Clark Board of Directors and Management Committee. Since 2016, Casady has served as general partner and chairman of the advisory board of Vestigo Ventures. Additionally, he is treasurer of the Casady family's One Step Forward Education Foundation, which focuses on changing the lives of children around the globe through education. He earned a BS degree from Indiana University and an MBA from DePaul University.



**ABBY JOSEPH COHEN, CFA**  
**Senior Investment Strategist & President**  
**Global Markets Institute, Goldman Sachs**

Abby Joseph Cohen, CFA, is senior investment strategist and president of the Global Markets Institute at Goldman Sachs. She has served on the Partnership Committee, the Investment Committee for the firm's U.S. retirement plans and is a senior champion for the Disability Interest Forum. She joined Goldman Sachs in 1990 and was named partner in 1998. Cohen began her career as an economist at the Federal Reserve Board in Washington, D.C. She is a presidential councillor at Cornell University, where she chairs the steering committee for the Jacobs Technion-Cornell Institute at Cornell Tech and serves on the board of Weill Cornell Medicine. She is a board member of the Brookings Institution, Economic Club of New York and the Jewish Theological Seminary and a former board chair of the Chartered Financial Analyst Institute, which awarded her the Distinguished Service Award. A guest lecturer at several graduate schools of business, she was a member of the White House-appointed Innovation Advisory Board for Economic Competitiveness. She earned degrees in economics from Cornell University and George Washington University. Her career is the subject of a Harvard Business School case study and a BusinessWeek cover story.



**LARRY COHEN**  
**Partner & Head of Operations & Technology**  
**AB**

Larry Cohen is a partner and the head of operations and technology at AB (AllianceBernstein), where he manages the global infrastructure for institutional and retail asset management, private wealth management and sell-side research and brokerage. He created a business-aligned infrastructure model to focus on key business priorities, enterprise goals and infrastructure risk management. Cohen also is engaged in AB's corporate social responsibility efforts including the sponsorship and mentorship of two New York City high school robotics teams and a partnership with Year Up to provide career opportunities and training to young adults in New York City. He joined AB in 2004 as chief technology officer. Prior to AB, he held senior leadership roles at UBS, Goldman Sachs, Morgan Stanley, Deutsche Bank and Fidelity Investments. He earned an AB degree in engineering and applied sciences from Harvard University. He is vice-chair of the board of Bridges to Prosperity, which provides isolated communities in Africa, Central and South America, and Asia with access to health care, education and economic opportunities by building footbridges over impassable rivers.



**DOUGLAS COTÉ, CFA**  
**Chief Market Strategist & Senior Portfolio Manager**  
**Voya Investment Management**

Douglas Coté, CFA, is the Voya Investment Management chief market strategist and the senior portfolio manager for the Global Perspectives funds, a group of global tactical asset allocation strategies. With more than 20 years of active money management experience as a portfolio manager and hedge fund chief investment officer, Coté delivers hands-on interpretations of the forces driving capital markets and effective ways to respond. In his former role as a portfolio manager with ING, he managed more than \$14 billion in equity assets. Coté is featured regularly on CNBC's "Closing Bell," Bloomberg TV's "In the Loop with Betty Liu," Fox Business, and other media outlets. A recognized authority on trading cost, impact and timing risk, he has been published in the International Journal of Managerial Finance and other publications, coining the term "Honest EPS" as a way of identifying high-quality stocks.



**BOB DOLL, CFA**  
**Chief Equity Strategist & Senior Portfolio Manager**  
**Nuveen Asset Management LLC**

Bob Doll, CFA, is chief equity strategist and senior portfolio manager at Nuveen Asset Management. He manages Nuveen's large cap equity series, which includes traditional large cap equities, specialty categories and alternative strategies. He is a well-respected authority on the equities markets among investors, advisors and the media. As the author of popular weekly commentaries and annual market predictions, Doll provides ongoing, timely market perspectives. Prior to joining Nuveen Asset Management, he held similar roles at other large asset management firms, including serving as chief equity strategist at Blackrock; president and chief investment officer of Merrill Lynch Investment Managers; and chief investment officer of OppenheimerFunds. Doll appears regularly on CNBC, Bloomberg TV and Fox Business News discussing the economy and markets. He earned a BS in accounting and a BA in economics from Lehigh University and an MBA from the Wharton School of the University of Pennsylvania.



**FRANCES DONALD**  
**Senior Economist**  
**Manulife Asset Management**

Frances Donald is a senior economist at Manulife Asset Management. As part of the economic team in Toronto, she forecasts global macro-economic and financial trends and analyzes the potential opportunities and impact on the company's individual business lines and investments. Prior to joining Manulife, she worked as a financial economist for Scotiabank in Toronto, where she produced a variety of daily and weekly publications with a focus on financial markets and economic strategy, emphasizing the implications for fixed-income and equity markets. Before that, she was a global macro analyst for Pavilion Global Markets in Montreal. Earlier in her career, she held various positions at Deloitte, Roubini Global Economics and Bank of Canada. Donald earned a BA in economics from Queen's University and a master's in economics from New York University.



**DR. BOB FROELICH**  
**Independent Director**

Bob Froehlich brings more than 35 years of Wall Street experience where he chaired investment committees for multiple global asset management organizations including Deutsche Bank, Hartford and Kemper Funds. He was elected to three "All American" institutional research teams. Froehlich has delivered investment speeches in 107 different countries, as well as having six investment books published and translated into 10 different languages. Since his retirement from Wall Street, he has begun a new chapter in his professional career by building a portfolio of boards of directors. He currently serves on the boards of AXAR Acquisition Corporation, Inc., Galen Robotics, Inc., NEXPOINT Capital, Inc., and Highland Capital Mutual Funds. Froehlich also is the chairman, chief executive officer, president and owner of the Kane County Cougars Baseball Club, the Class A affiliate of the Arizona Diamondbacks.



**KATHLEEN HAYS**  
**Global Economics & Policy Editor**  
**Bloomberg Television & Radio**

Kathleen Hays is global economics and policy editor for Bloomberg television and radio focusing on the Fed and central banks around the world, with a special emphasis on the Pacific Rim. Prior to her current role, Hays hosted Bloomberg Radio's "Taking Stock," a program that covered the forces driving the U.S. and global markets. Recognized as one of the top economics reporters and anchors in the country, Hays has covered the U.S. economy and the Federal Reserve for more than 20 years. She joined Bloomberg in 2006 after years as an on-air and online economics correspondent at CNN, CNNfn, and CNBC, where she served as a host, correspondent and commentator for numerous programs including "Squawk Box." She began her career as a print journalist, initially serving as a founder, director, economics correspondent and New York bureau chief at Markets News International, a financial news service. She earned both a bachelor's degree and a master's degree in economics from Stanford University.



**GARY KATZ**  
**Former President & Chief Executive Officer**  
**International Securities Exchange**

Gary Katz was president and chief executive officer of the International Securities Exchange and a co-founder of the company. He is one of the principal developers of the unique options market structure—an auction market on an electronic platform—used by both ISE and ISE Gemini. Before ISE, Katz served from 1997-98 as president and co-founder of K-Squared Research, a financial services consulting firm. From 1986-97, he held several positions in the options and index products division at the New York Stock Exchange, where he became managing director. During his tenure at NYSE, Katz also was a co-founder of the Options Industry Council. Before 1986, Katz was an actuary with the Equitable Life Assurance Company and an associate of the Society of Actuaries. Katz taught business mathematics applications as an adjunct professor of statistics at the Stern School of Business, New York University, and also taught options strategies and pricing at the New York Institute of Finance. He earned an MS in statistics from New York University and a BA from Queens College.



**TOM KEENE, CFA**  
**Editor-At-Large**  
**Bloomberg News**

Tom Keene, CFA, is an editor-at-large at Bloomberg News and host of "Bloomberg Surveillance," the morning program featuring economic, finance and investment news. He can be heard on the program starting at 6 a.m. across Bloomberg TV, radio, Bloomberg.com and Bloomberg's devices for mobile and tablets. In addition, Keene provides economic and investment perspective to Bloomberg TV and to its various news divisions. He also founded the "Chart of the Day" article, available on the Bloomberg Professional Service. Keene is the editor of "Flying on One Engine: The Bloomberg Book of Master Market Economists" (2005). He is a graduate of the Rochester Institute of Technology and is enrolled in courses at the external programme of the London School of Economics & Political Science. A chartered financial analyst, Keene is a member of the CFA Institute, the National Association for Business Economics, the American Economic Association and the Economic Club of New York.



**DR. DAVID KELLY, CFA**  
**Chief Global Strategist**  
**J.P. Morgan Funds**

David Kelly, CFA, is the Chief Global Strategist and Head of the Global Market Insights Strategy Team for J.P. Morgan Funds. With over 20 years of experience, David provides valuable insight and perspective on the economy and markets to thousands of financial advisors and their clients. Throughout his career, David has developed a unique ability to explain complex economic and market issues in a language that financial advisors can use to communicate to their clients. He is a keynote speaker at many national investment conferences. David is also a frequent guest on CNBC, and other financial news outlets and is widely quoted in the financial press.



**KEVIN KELLY**  
**Chief Investment Officer**  
**Recon Capital Partners &**  
**Managing Director, Horizons ETFs**

Kevin Kelly serves as chief investment officer of Recon Capital Partners and managing director of Horizons ETFs. He oversees all investment decisions, research and strategies in the equity and options markets. He also serves as portfolio manager for Horizons ETFs' USA-listed products. Previously, Kelly was a portfolio manager for a private fund from 2008-11, focusing on equities and equity derivatives. He also worked for Goldman Sachs and at Deutsche Bank. He contributes weekly to "Options Insight" on Bloomberg TV and is a market commentator for "Mornings with Maria" on Fox Business. His thought leadership frequently can be found in several media outlets including The Wall Street Journal, Reuters, CNBC, Cheddar, The New York Times and Barron's. He earned a BS in finance from the W.P. Carey School of Business and the Barrett Honors College at Arizona State University.



**JJ KINAHAN**  
**Chief Strategist**  
**TD Ameritrade**

JJ Kinahan, chief strategist for TD Ameritrade, began his career as a Chicago Board Options Exchange market maker in 1985, trading primarily in the S&P 100 and S&P 500 pits. While mainly an independent market maker, he also worked for ING Bank, Blue Capital and was managing director of option trading for Van Der Moolen, USA. In 2006, Kinahan joined the thinkorswim group, which eventually was acquired by TD Ameritrade. He led the Educational Events Team, working to implement the instructional path for thousands of investors throughout the United States. In 2009 he became the managing director of active trader services. Kinahan, a 25-year trading veteran, is a frequent CNBC commentator, a Forbes contributor and is often quoted in the Wall Street Journal, the Financial Times and many other media outlets. He is also a member of the board of directors at NYSE Arca and is a member of the Arbitration Committee at the Chicago Board Options Exchange.



**JEFFREY KLEINTOP, CFA**  
**Chief Global Investment Strategist**  
**Charles Schwab & Co.**

Jeffrey Kleintop, CFA, chief global investment strategist at Charles Schwab, analyzes and discusses international markets, trends and events to help U.S. investors understand their significance and financial implications. Prior to Schwab, he served as chief market strategist at LPL Financial. Earlier in his career he was chief investment strategist at PNC Wealth Management and senior investment strategist at ARIS Corporation of America. He has been cited in a range of national media outlets including The Wall Street Journal, which labeled him one of "Wall Street's best and brightest," and he has been a featured or keynote speaker at dozens of industry events annually. He is the author of "Market Evolution: How to Profit in Today's Changing Financial Markets." He has a BS in business administration from the University of Delaware and an MBA from Pennsylvania State University. He also studied at the London School of Economics and is a chartered financial analyst.



**DAVID KUDLA**  
**Founder, CEO & Chief Investment Strategist**  
**Mainstay Capital Management, LLC**

David Kudla is founder, CEO and chief investment strategist of Mainstay Capital Management, LLC. He has been ranked by Barron's as one of the "Top 100 Independent Financial Advisors" in the country for the past seven years, and in the top 25 for the past two years. Kudla is a contributing writer for Dow Jones and Forbes. He regularly speaks at national conferences, publishes articles about retirement planning and investing, and advises thousands of workplace savings plan participants. He regularly appears on CNBC, Bloomberg, Fox Business and other networks, and is frequently quoted in the financial press. Kudla has earned his certificate in financial planning and two postgraduate degrees, including a master's in management at Stanford University. He is an adjunct professor, serves on several university advisory councils, and sponsors student-managed portfolios, including the largest at Stanford University.



**STEPHANIE LINK**  
**Managing Director, Equity Investments**  
**TIAA Global Asset Management**

Stephanie Link is a managing director and equity portfolio manager for the TIAA organization, where she manages large-cap equities primarily based in the U.S. region. She has 24 years of investment experience. Prior to joining TIAA, she spent seven years at The Street, a financial news and services website, as the chief investment officer and was the co-portfolio manager and director of Research of Action Alerts Plus, Jim Cramer's Charitable Trust. She was responsible for all premium content at The Street and the daily management of the charitable trust, which included macro strategy, portfolio construction and stock selection. Before this, she spent 10 years at Prudential Equity Group as managing director of institutional sales and as director of research. Link is a CNBC contributor and appears regularly on "Closing Bell" and "Fast Money Halftime" shows. She began her career at Dean Witter Reynolds, Inc. She earned a BS degree in finance at Boston College.



**MARK OKADA, CFA**  
**Co-Founder & Chief Investment Officer**  
**Highland Capital Management**

Mark Okada, CFA, is co-founder and chief investment officer of Highland Capital Management LP, a Dallas-based investment adviser with \$18 billion in assets under management. At Highland, he is responsible for overseeing the firm's investment activities for its various strategies. He is also portfolio manager of the Highland Floating Rate Opportunities Fund, which has won the Lipper Fund Award for best loan participation fund in each of the last two years. Okada is responsible for structuring one of the industry's first arbitrage CLOs and has been instrumental in the development of Highland's bank loan separate account and mutual fund platforms. Additionally, he has been named CNBC "squawk master" and is regularly featured on CNBC's "Squawk Box," "Opening Bell" on Fox Business, and on many other media outlets. He is a director of NexBank, a member of the Grow South Fund Advisory Board, chairman of the board of directors of Common Grace Ministries and a member of the board of directors for Education is Freedom.



**KURT N. SCHACHT, JD, CFA**  
**Managing Director, Standards & Advocacy**  
**CFA Institute**

Kurt Schacht, JD, CFA, is managing director of the Standards and Advocacy division of CFA Institute. He is responsible for all efforts to develop and maintain the highest ethical standards for the investment community including CFA Institute's Code of Ethics and Standards of Professional Conduct, Global Investment Performance Standards, CFA Institute Research Objectivity Standards, and CFA Institute Soft Dollar Standards. Schacht has been involved in the investment management business since 1990, serving as chief operating officer for a retail mutual complex in White Plains, New York; general counsel and COO for a Manhattan-based hedge fund; and as chief legal officer for the State of Wisconsin Investment Board. He has an extensive background in securities law and regulation, alternative investments, hedge funds, financial reporting and corporate governance matters. He is a chair on the U.S. Securities and Exchange Commission Investor Advisory Committee and a member of the advisory board of the Millstein Center for Global Markets, Columbia Law School. He holds a JD and a BS from the University of Wisconsin.



**ASHISH SHAH**  
**Chief Investment Officer of Global Credit &**  
**Head of Fixed Income**  
**AB**

Ashish Shah is chief investment officer of global credit and head of fixed income for AB. He is also a partner. Shah oversees all of AB's credit-related strategies, including its global and regional investment-grade and high-yield strategies. As head of fixed income, Shah is responsible for the management and strategic growth of the overall business. He is the author of several papers and blogs, including those highlighting high-yield bonds as attractive substitutes for equities (June 2015), concerns around the bank loan market (November 2013) and the dangers in reaching for yield in the high-yield market (August 2013). Prior to joining AB in 2010, he was a managing director and head of global credit strategy at Barclays Capital, where he was responsible for the high-grade, high-yield, structured credit and municipal strategy groups and the special situations research team. From 2003-08, Shah was the head of credit strategy at Lehman Brothers. He holds a BS in economics from the Wharton School of the University of Pennsylvania.



**SAM STOVALL**  
**Chief Investment Strategist**  
**CFRA**

As chief investment strategist, Sam Stovall serves as analyst, publisher and communicator of CFRA's outlooks for the economy, market and sectors. He is chairman of the CFRA Investment Policy Committee, where he focuses on market history and valuations, as well as industry momentum strategies. Prior to joining CFRA, Stovall was managing director and chief investment strategist at S&P Global for more than 27 years, and served as editor in chief at Argus Research, an independent investment research firm in New York City. Stovall is the author of "The Seven Rules of Wall Street," and writes weekly "Sector Watch" and "Investment Policy Committee meeting notes" on CFRA's MarketScope Advisor platform. His work is also found in CFRA's flagship weekly newsletter The Outlook. He received an MBA in finance from New York University and a BA in history/education from Muhlenberg College. He is also a certified financial planner. Stovall is a board member of WISE (Working in Support of Education), and a trustee of Muhlenberg College and of the Securities Industry Institute.©



**JOSEPH M. TERRANOVA**  
**Chief Market Strategist, Virtus Investment Partners**  
**Fast Money Contributor, CNBC**

Joe Terranova is the chief market strategist for Virtus Investment Partners. He works with the regional sales teams and financial advisers who sell the company's investment products and provide insight into the domestic and global investing landscape. Terranova has represented Virtus as a keynote speaker and is a member of the firm's Investment Oversight Committee. Before joining Virtus in 2008, he spent 18 years at MBF Clearing Corp., rising to the position of director of trading for the company and its subsidiaries. He is known for his risk-management skills, honed while overseeing MBF's proprietary trading operations during some of the most calamitous times for the U.S. markets, including the first Gulf War, the 1998 Asian Crisis and 9/11. He is a panelist on CNBC's "Fast Money" and a frequent panelist on "Fast Money Halftime Report." He has a bachelor's degree in finance from The Peter J. Tobin College of Business at St. John's University.



**DR. VICKI A. WALIA**  
**Senior Vice President &**  
**Head of Digital Investment Solutions**  
**AB**

Vicki A. Walia is a senior vice president and head of digital investment solutions for AB. She leads a firm-wide initiative to develop business strategies that harness recent trends in technology, regulation and the delivery of investment services to enhance and differentiate AB's existing services. Previously she was director of talent management and diversity, responsible for the implementation of talent development initiatives and for leading the firm's diversity initiatives. She joined AB in 2007 from Development Dimensions International (DDI), where she worked with clients on projects related to assessment, selection and leadership/executive development. Walia has presented at the annual meetings of the Society for Industrial and Organizational Psychology, the Academy of Management and the Global Business Forum. She also has been an adjunct professor at Montclair State University, where she taught courses in organizational behavior and research methodology. She earned a BFA in music from York University and an MS and PhD in industrial and organizational psychology from Alliant International University.



**RICHARD YAMARONE**  
**Senior Economist**  
**Bloomberg Brief**

Richard Yamarone is an economist with three decades of experience. He focuses on monetary and fiscal policy, economic indicators, fixed income and general macroeconomic conditions for "Bloomberg Brief: Economics," a daily newsletter. He is the creator of the Bloomberg Orange Book, a compilation of macroeconomic anecdotes gleaned from comments CEOs and CFOs made on quarterly earnings conference calls. He travels extensively to speak to clients and corporate executives on the economic outlook and career and management coaching. Earlier in his career, Yamarone was director of economic research at Argus Research and a member of the firm's investment policy committee. He has been a consultant to monetary and fiscal policymakers, served as an economic adviser to major U.S. corporations and has held senior positions for several international and domestic money centers and investment banks. Yamarone has taught courses on macroeconomics and economic indicators at several colleges and is the author of the "Trader's Guide to Key Economic Indicators" (Bloomberg Press, 2012).