

Keynote Speakers



GINA MARTIN ADAMS, CFA, CMT
Chief U.S. Equity Strategist
Bloomberg Intelligence

Gina Martin Adams, CFA, CMT, is the chief U.S. equity strategist for Bloomberg Intelligence, a unique research platform that provides context on markets, industries, companies and government policy. Adams provides top-down perspective on the equity market, sectors and industries with a multidisciplinary approach that utilizes fundamental, quantitative and technical analysis. She frequently presents her views at industry conferences, professional associations and investment organizations and has been recognized for portfolio strategy, technical strategy and economics in Institutional Investor magazine's All-America Research survey. Prior to joining Bloomberg, she was the head of U.S. equity strategy for Wells Fargo Securities, where she provided analysis and investment allocation recommendations for Wells Fargo Securities' institutional clients. Previously, she was an economist for Wachovia Bank, and an investment strategy analyst for Evergreen Asset Management. She has a BS in business administration with concentrations in finance and marketing from the University of Florida. She holds the chartered financial analyst and chartered market technician designations.



JOHN AUGUSTINE, CFA
Chief Investment Officer
Huntington Bank

John Augustine, CFA, has spent 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 longtime 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, Richard Bernstein heads the 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 35 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 Smart Money magazine's "Power 30." He earned his BA from Hamilton College and his MBA from New York University.



REGINALD M. BROWNE
Senior Managing Director
Cantor Fitzgerald

Reginald M. Browne is a senior managing director overseeing the Exchange Traded Funds business at Cantor Fitzgerald. ETFs now account for about 30 percent of the daily trading value on U.S. stock exchanges. Browne's team is one of the biggest market makers in the ETF industry, facilitating about \$1 trillion in trades annually for global pension funds, asset managers, wealth managers and broker dealers. Browne is widely known as "The Godfather of ETFs" because of his influence helping bring to market nearly 25 percent of the ETFs listed in the U.S. Browne has been prominently featured in major business publications, including a cover story in Bloomberg Markets, and regularly speaks at leading industry conferences. Prior to joining Cantor Fitzgerald, he was managing director, co-global head of the ETF Group at Knight Capital Group. Earlier he was a senior vice president and co-head of the ETF Group at Newedge USA. He has more than three decades of Wall Street experience. Browne earned his bachelor of business administration from La Salle University.



ABBY JOSEPH COHEN, CFA
Senior Investment Strategist
Goldman Sachs

Abby Joseph Cohen, CFA, is senior investment strategist at Goldman Sachs. She has served as president of the Global Markets Institute, 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.



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 26 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 Bloomberg TV, CNBC and CNN and is frequently quoted in The Wall Street Journal and Reuters. 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.



DAVID M. DARST, CFA
Former Chief Investment Strategist
Morgan Stanley Wealth Management
Senior Investment Advisor
Global Family Offices

David M. Darst, CFA, is a former chief investment strategist at Morgan Stanley for 17 years, founding president of the Morgan Stanley Investment Group and founding chairman of the Morgan Stanley Wealth Management Asset Allocation Committee. Prior to Morgan Stanley, he held senior management posts at Goldman Sachs within the equities division and also served as resident manager of its private bank in Zurich. He is currently a senior investment advisor to Global Family Offices. Darst has written 13 books including the bestselling “The Little Book That Saves Your Assets.” He appears frequently on CNBC, Bloomberg, FOX and other networks and has contributed numerous articles to Barron’s, Euromoney and The Money Manager. Darst earned his MBA from Harvard Business School and has a bachelor’s in economics from Yale University. He has lectured extensively at Wharton, Columbia and other prominent business schools and was a visiting faculty member at Yale College, Yale School of Management and Harvard Business School. He is a CFA charterholder. In 2011 he was inducted into the Quinnipiac University Business Leader Hall of Fame.



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, advisers 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 Oppenheimer Funds. 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 macroeconomic 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.



CRAIG S. DONOHUE
Executive Chairman & CEO
OCC

Craig S. Donohue is executive chairman and CEO of OCC, the world’s largest equity derivatives clearing organization and the foundation for secure markets. He has led transformational change across the organization focused on enhancing OCC’s resiliency to systemic risk, strengthening its capital structure and reinvigorating its leadership team. Prior to joining OCC, Donohue spent more than two decades in global financial markets, most recently as CEO of CME Group from 2004–12. During that time, he led the successful completion of more than \$20 billion in mergers and acquisitions, including CME’s historic merger with the Chicago Board of Trade in 2007 and the acquisition of both the New York Mercantile Exchange and the Commodity Exchange Inc. in 2008. Donohue has a master’s degree in management from Northwestern University’s Kellogg Graduate School of Management, a master of law in financial services regulation from IIT Chicago-Kent College of Law, a JD from John Marshall Law School, and a BA in political science and history from Drake University.



ABIGAIL DOOLITTLE
On-Air Markets Reporter
Bloomberg Television

Abigail Doolittle is an on-air markets reporter for Bloomberg Television, reporting on the various financial markets throughout each business day. Her reports often place special focus on charts and technical analysis. Prior to joining Bloomberg Television in October 2015, Doolittle was a CNBC contributor and analyzed the financial markets regularly as a guest commentator. This was simultaneous to working as a technical strategist at Seaport Global Securities, an investment bank, and as an analyst at Peak Theories Research at various points over the course of three years. She founded Peak Theories Research, an online technical analysis firm, in 2009. She started her Wall Street career in 1995 with Morgan Stanley’s investment banking division and gained 15 years of experience in the industry before becoming a broadcast journalist. Doolittle graduated from Colgate University, summa cum laude, with a degree in philosophy and was elected to Phi Beta Kappa.



EMANUELLA ENENAJOR
Director & Portfolio Manager
BlackRock

Emanuella Enenajor is director and portfolio manager for the Global Inflation-Linked Bond Team at BlackRock, a global investment management corporation based in New York City. Before joining BlackRock in 2016, she was a senior North American economist at Bank of America Merrill Lynch Global Research. Her role included U.S. and Canadian economic research and forecasting, in which she has developed an extensive background in modeling inflation. Prior to that, Enenajor spent three years as a senior economist with Canadian Imperial Bank of Commerce Economics, where she focused on economic trends and their implications for financial markets. Earlier in her career, she was an analyst in the financial markets group at the Bank of Canada. Enenajor earned a master of financial economics from the University of Toronto & Rotman School of Management in 2009 and a BSC in statistics and economics from the University of Toronto in 2007.

Keynote Speakers continued



JAMIE FARMER
Managing Director
Index Data Services
S&P Dow Jones Indices

Jamie Farmer is managing director, Index Data Services, for S&P Dow Jones Indices. He is responsible for leading the index data services team and capital markets outreach.

In this role, he has oversight of S&P DJI's commercial index data strategy and relationships with market data vendors. His analysis of the Dow Jones Industrial Average®, indexing, securities industry and multi-asset classes is widely quoted in the business press, including the Wall Street Journal, Financial Times and other financial industry publications, as well as on television and radio. Previously, Farmer also led the Index Investment Strategy and Communications teams at S&P DJI. Prior to joining S&P DJI, Farmer was executive director of Dow Jones Indexes and head of global business development and communications. In 1991 Farmer began his career as vice president of marketing at the Philadelphia Stock Exchange, where he was responsible for promotion and sales of PHLX's sector indices, index-linked products, and the exchange's other varied trading products and services.



DR. BOB FROEHLICH
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, The 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.



NEEL KASHKARI
President & CEO
Federal Reserve Bank of Minneapolis

Neel Kashkari is president and chief executive officer of the Federal Reserve Bank of Minneapolis, where he also serves on the Federal Open Market Committee, bringing the Fed's Ninth District's perspective to monetary policy discussions in Washington. In addition to his

responsibilities as a monetary policymaker, Kashkari oversees all operations of the bank. He began his career as an aerospace engineer at TRW in California, where he developed technology for NASA space science missions. Following graduate school, he joined Goldman Sachs in San Francisco, where he helped technology companies raise capital and pursue strategic transactions. From 2006-09, he served in several senior positions at the U.S. Department of the Treasury. He returned to California in 2009 and joined PIMCO as managing director and member of the executive office. He left the firm in 2013 to explore returning to public service. He earned his bachelor's and master's degrees in mechanical engineering at the University of Illinois at Urbana-Champaign and his MBA from the Wharton School at the University of Pennsylvania.



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

5 a.m. across Bloomberg TV, radio, Bloomberg.com and Bloomberg's devices for mobile and tablets. In addition, Keene provides economic and investment perspectives 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.



GEORG KELL
Founder & Former Executive Director
United Nations Global Compact
Chairman, Arabesque Asset Management

As founder and former executive director, Georg Kell helped establish the United Nations Global Compact as the foremost platform for the development, implementation and disclosure of responsible and

sustainable corporate policies and practices. It is the world's largest voluntary corporate sustainability initiative with over 9,000 corporate signatories in more than 160 countries. In a career of more than 25 years at the United Nations, he also oversaw the conception and launch of the Global Compact's sister initiatives: the Principles for Responsible Investment, and the Principles for Responsible Management Education, together with the Sustainable Stock Exchanges initiative. Kell is chairman of Arabesque Partners, an Anglo-German asset management firm that integrates environmental, social and governance data with quantitative investment strategies. He started his career as a research fellow in engineering at the Fraunhofer Institute for Production Systems and Design Technology in Berlin. He then worked as a financial analyst in various countries in Africa and Asia. A native of Germany, he holds advanced degrees in economics and engineering from the Technical University of Berlin.



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

David Kelly, CFA, is chief global strategist and head of the Global Market Insights Strategy Team for J.P. Morgan Funds. With more than 20 years of experience, Kelly provides valuable insight and perspective on the economy and markets to thousands of financial advisers and their

clients. Throughout his career, Kelly has developed a unique ability to explain complex economic and market issues in a language that financial advisers can use to communicate to their clients. He is a keynote speaker at many national investment conferences and a frequent guest on CNBC and other financial news outlets. Prior to joining J.P. Morgan Funds, he served as economic adviser to Putnam Investments. He also has served as a senior strategist/economist at SPP Investment Management, Primark Decision Economics, Lehman Brothers and DRI/McGraw-Hill. Kelly is a CFA® charterholder. He also has an MA and PhD in economics from Michigan State University and a BA in economics from University College Dublin in Ireland.



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, as 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 Advisers” in the country for the past eight years, and in the top 25 for the past three 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 Bloomberg, CNBC, 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.



MICHAEL MCDONOUGH
Global Director of Economic Research
& Chief Economist
Bloomberg Intelligence

Michael McDonough is the global director of economic research and chief economist at Bloomberg Intelligence, where he built and manages a team of two dozen economists spread across the world. He provides in-

depth analysis of macroeconomic data, policy and trends, and participates in key financial conferences, as well as strategic C-Suite client meetings. McDonough previously held roles at Bloomberg, overseeing the company’s global economic business, including product development and economic data and functionality on the Bloomberg Professional service, and two years in Hong Kong where he focused on Asian markets while launching Bloomberg’s research business in Asia. He continues to be widely quoted globally as an economist and media spokesman. He began his career working as an economist and global-macro strategist covering Latin America at Deutsche Bank and served as an independent consultant throughout the Asia region, advising hedge funds, central banks and government organizations about macro-trading strategies.



PHIL ORLANDO, CFA
Chief Equity Strategist &
Senior Portfolio Manager
Federated Investors

Phil Orlando, CFA, is Federated Investors’ chief equity strategist and a senior portfolio manager of Federated Global Allocation Fund. He joined Federated in 2003, with more than 35 years of industry experience, and is

responsible for formulating the firm’s opinions about the equity market, as well as positioning strategies for its investment products. He serves as the chairman of both the Macro Economic Policy and the PRISM Asset Allocation committees. Orlando is also the group head of the Macro/Balanced and Growth/Income teams within Federated’s equity division. For the past 20 years, he has been a regular contributor to several of CNBC’s programs, including “Squawk Box,” “Squawk on the Street,” “Power Lunch,” “Closing Bell” and “Nightly Business Report” as well as Fox Business News, Bloomberg, Reuters, The Wall Street Journal and The New York Times. He received his MBA and bachelor’s degree from New York University. He is a certified financial analyst.



DAVID E. OURLICHT
Commissioner & Chair of the
Investment Committee
New York State Insurance Fund

David Ourlicht is managing director and special adviser to the chairman of GAMCO, a \$40 billion AUM asset management firm offering a combination of value equity and investment partnership strategies. Ourlicht spent

many years as a public finance investment banker concentrating on revenue bond financing for transportation and infrastructure projects. He then led the Debt and Equity Capital Markets Group at a leading boutique investment banking firm before his more recent experience in the asset management industry. He is a commissioner of the New York State Insurance Fund, which provides approximately 32 percent of Workers Compensation insurance policies in New York State. He is also chairman of the fund’s Investment Committee and oversees fund policy regarding asset allocation and performance guidelines. As a trustee of the State of New York Construction Fund, Ourlicht was designated by the New York City Public Advocate to the New York City Employees Retirement System, the largest municipal public employee retirement system in the U.S. with over \$51 billion in assets. Ourlicht has a BS from the State University of New York College at Buffalo.

Keynote Speakers continued



ANDREW W. RUSSELL
Director of Fixed-Income Investments
Pension Boards – United Church of Christ

Andrew Russell is director of fixed-income investments for the Pension Boards – United Church of Christ. He also directs investment management activities for fixed-income portfolios for UCC churches, conferences and associations on behalf of UCC associated ministry United

Church Funds. Russell has direct oversight for portfolio management, research, analysis, trading and risk positioning for all internally managed fixed-income portfolios and is responsible for their performance. He serves as lead portfolio manager for the Core-Fixed strategy and the Stable Value Fund. Russell advises the CIO and team regarding allocation to and selection of externally managed fixed-income strategies and their managers. He has contributed as adviser, speaker and panelist at various investor forums. Before joining the PB-UCC in 2003, he spent over 10 years at Chase Asset Management, where he held positions as analyst, trader and portfolio manager. He has a BA in history and political science from the University of Vermont.



TERRY SAVAGE
Nationally Syndicated Financial
Columnist & Author

Terry Savage is a nationally recognized expert on personal finance, the economy and the markets. She writes a weekly personal finance column syndicated in major newspapers by Tribune Content Agency. Her columns also appear on the Huffington Post. She makes frequent

appearances as a money expert on CNN, and other national television and radio programs, commenting on the financial markets and current economic events. She is regularly featured on WGN Radio and WGN-TV in Chicago, with a weekly personal finance segment. Savage is the author of four best-selling books on personal finance. She has worked nationally with major corporations, including Allstate, Wal-Mart, Walgreens and Hilton to share her message of financial literacy and empowerment with their employees. She is a registered investment adviser for both stocks and futures. She started her career as a stockbroker and became a founding member and first woman trader on the Chicago Board Options Exchange. She serves on the board of directors of CME Group, parent company of the Chicago Mercantile Exchange.



DR. JOHN SILVIA
Managing Director & Chief Economist
Wells Fargo Securities LLC

John Silvia is managing director and chief economist for Wells Fargo, based in Charlotte, North Carolina. He has held his position since he joined Wachovia, a Wells Fargo predecessor, in 2002 as the company's chief economist. Previously, he worked on Capitol Hill as senior economist

for the U.S. Senate Joint Economic Committee and as chief economist for the U.S. Senate Banking, Housing and Urban Affairs Committee. Before that, he was chief economist of Kemper Funds and managing director of Scudder Kemper Investments. Silvia is a certified business economist. He serves as a member of the Blue Chip Panel of Economic Forecasters and on an informal advisory group for the Federal Reserve Bank of Philadelphia. He has BA and PhD degrees in economics from Northeastern University in Boston and a master's degree in economics from Brown University. He has published several books on economic decision making, forecasting and modeling.



PAUL SMITH, CFA
President & CEO
CFA Institute

Paul Smith, CFA, leads CFA Institute and its more than 130,000 members worldwide in promoting the highest standards of education, ethics and professional excellence for the ultimate benefit of society. Smith has more than 30 years of leadership experience in the asset management

industry, including over 18 years in Asia. He joined Bank of Bermuda in Hong Kong as Asia head of securities services in 1996. After HSBC's acquisition of the bank in 2004, he served as global head of securities services and global head of alternative funds administration based in New York, where he was responsible for the delivery of services to 2,000 investment funds with over \$250 billion of assets. Before joining CFA Institute in October 2012 as managing director for Asia Pacific, Smith was chairman and CEO of Asia Alternative Asset Partners. He is a fellow of the Institute of Chartered Accountants of England and Wales and an executive committee member of the Alternative Investment Association, Hong Kong. Smith holds a master's degree in history from Oxford University.



LIZ ANN SONDEERS
SVP & Chief Investment Strategist
Charles Schwab & Co.

As chief investment strategist at Charles Schwab, Liz Ann Sonders analyzes and interprets the economy and markets. Sonders is also a senior vice president and member of the Investment Committee at Windhaven Investment Management, which oversees Windhaven's

research initiatives and investment decisions. In 1999, she joined U.S. Trust—which was acquired by Schwab in 2000—as a managing director and member of its Investment Policy Committee. She is a keynote speaker at many company and outside conferences and a regular guest and guest host on many CNBC programs, as well as on Fox Business News, "Nightly Business Report," Bloomberg TV & Radio, CNN and others. Sonders is also regularly quoted in financial publications, including The Wall Street Journal, The New York Times and Barron's. In 2005, Sonders was appointed to and served on the President's Advisory Panel on Federal Tax Reform. Sonders has a BA in economics and political science from the University of Delaware. She received her MBA in finance from Fordham University's Gabelli School of Business.



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. 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.



RICHARD S. THOMPSON
Managing Director of Research
Fidelity Investments

Richard Thompson is managing director of research at Fidelity Management & Research Company, the investment advisor for Fidelity’s family of mutual funds. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance,

brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. In this role, Thompson is responsible for leading the Small Cap team and Fidelity’s undergraduate research associate program. Additionally, he is the lead portfolio manager of Fidelity Stock Selector Small Cap Fund and Fidelity Series Small Cap Opportunities Fund. Previously, Thompson held various other positions within Fidelity, including portfolio manager, small cap team leader at Fidelity International Limited in London, equity research analyst and research associate. Before joining Fidelity in 1996, he worked as an analyst and fund manager on the Manchester Growth Fund. He has been in the financial industry since 1991. He has a BS in finance from Bentley College.



JASON DESENA TRENNERT
Chairman
Strategas Research Partners

Jason Trennert is the chairman and chief executive officer of Strategas Research Partners and its affiliated companies. Trennert is known as one of Wall Street’s top thought leaders on the subject of markets and economic policy. His research pieces are read by leading institutional

investors and corporate executives across the globe. In 2006, Trennert co-founded Strategas, which originally began with just five employees. Today, the firm employs over 50 research analysts, institutional salesmen and sales traders at its offices in New York, Washington, D.C., and Columbus, Ohio. Trennert is a regular guest host on CNBC’s “Squawk Box” and “Bloomberg Surveillance” with Tom Keene. He has penned numerous op-ed pieces in The Wall Street Journal, the Financial Times and Investor’s Business Daily and is the author of three books on investing and the investment business including “My Side of the Street,” which was published in 2015. He has an MBA from The Wharton School at the University of Pennsylvania and a BS in international economics from Georgetown University.



HAN YIK
Head of Institutional Investors
World Economic Forum

Han Yik is head of institutional investors at the World Economic Forum. He works with senior leadership of the world’s largest investors (with combined assets exceeding \$2.5 trillion USD) and with top government officials on issues around long-term investing. Yik provides strategic

guidance on initiatives involving public-private cooperation. He has written and spoken extensively on topics including innovations in the future of investing and the need for global retirement reform. Previously, Yik was a senior institutional portfolio strategist at Bank of America Merrill Lynch. He began his career in management consulting at Towers Perrin (now known as Willis Towers Watson) and Mercer, where he advised large multinational companies such as Citibank, MasterCard and Pfizer on financial strategy relating to employee benefits and retirement plans, as well as providing analytical support in private equity mergers and acquisitions. He earned his BS in applied mathematics with a concentration in operations research from Yale University, where he won the Benjamin F. Barge Prize for Excellence in Mathematics.



JAE S. YOON, CFA
Chief Investment Officer
New York Life Investment Management

Jae Yoon is the chief investment officer of New York Life Investment Management, where he oversees the ongoing evaluation of the investment performance of the strategies managed by NYLIM’s boutiques and affiliate portfolio teams. Additionally, he is chairman of the

Investment Governance Committee and co-leads the Strategic Asset Allocation & Solutions team, which oversees the portfolio management of MainStay and third-party asset allocation strategies. Prior to joining NYLIM, Yoon was head of quantitative research, analytics and risk management at Western Asset Management. Before that, he was with Merrill Lynch Investment Managers, where he served as the head of risk and performance for the Pacific and European regions in Tokyo and London, respectively. Yoon also worked at JP Morgan Securities in Asia as regional head of risk management control for fixed-income and equity derivative trading. He is a certified financial analyst and holds FINRA Series 3 and 7 registrations. He earned a BS in electrical engineering and a master’s in operations research at Cornell University.