

Keynote Speakers



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 a chartered market technician (CMT), a designation he helped to create.



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. The bank 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 &
Chief Investment 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.



HEATHER BRILLIANT, CFA
Managing Director, Americas
First State Investments

Heather Brilliant, CFA, is managing director, Americas at First State Investments, responsible for managing the business in the Americas and further expanding First State Investment's market presence across the region. She is also a member of the firm's Global Executive Committee. Brilliant has worked in the industry more than 20 years. Prior to joining First State Investments in 2017, she spent 14 years at Morningstar, most recently as chief executive officer of Morningstar Australasia. In this role, she devised and drove various initiatives based on functional and local market priorities, including the development and implementation of a 10-year strategy to accelerate business growth. Preceding this, she led the equity and corporate credit research teams at Morningstar. Brilliant also spent several years as an equity research analyst for Coghill Capital Management and Driehaus Capital Management. She earned a bachelor's degree in economics from Northwestern University and a master's in business administration from the University of Chicago Booth School of Business.



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.

Keynote Speakers continued



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, 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.



JOHN P. DAVIDSON
Chief Executive Officer
OCC

John P. Davidson is chief executive officer at OCC, the world's largest equity derivatives clearing organization. As CEO, he has oversight responsibilities for information technology, financial risk management, corporate risk management, legal and compliance functions. He joined OCC in 2017 as president and chief operating officer, where he was responsible for technology and operations functions. Davidson has over 35 years of experience in the global financial industry. Prior to OCC, he served as chief compliance officer at Citigroup. In that role, he led the global, 2,400-person, 87-country compliance organization responsible for identifying, evaluating, mitigating and reporting on compliance, conduct, regulatory and reputation risks across the institution. Previously he served as Citi's risk division chief administrative officer and head of enterprise risk management. Before his tenure at Citi, Davidson spent two years as chief business development officer at CME Group and 12 years at Morgan Stanley. He earned an MBA in financial management and international business from the University of Chicago and a bachelor's degree in political science from the University of Illinois-Urbana.



DR. JOSEPH DAVIS
Global Chief Economist
Vanguard

Joseph Davis is the global chief economist and global head of Vanguard Investment Strategy Group. Its research and client-facing team develops asset allocation strategies and conducts research on the capital markets, the global economy, portfolio construction and related investment topics. Davis also chairs the firm's Strategic Asset Allocation Committee for multi-asset class investment solutions. As Vanguard's global chief economist, Davis is a member of the senior portfolio management team for Vanguard Fixed Income Group. He is a frequent keynote speaker, has published white papers in leading academic and practitioner journals, and helped develop Vanguard Capital Markets Model® and the firm's annual economic and capital markets outlook. Davis earned his BA summa cum laude from Saint Joseph's University and his MA and PhD in economics from Duke University.



BOB DOLL, CFA
Chief Equity Strategist &
Senior Portfolio Manager
Nuveen

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
Head of Macroeconomic Strategy
Manulife Asset Management

Frances Donald is head of macroeconomic strategy within the asset allocation team at Manulife Asset Management. As head of the macroeconomic and strategy team, she coordinates global macro research to assist the team in developing its asset class forecasts. She also forecasts global macroeconomic and financial trends and analyzes the potential opportunities and impacts on the company's individual business lines and investments. Prior to joining Manulife, Donald worked as a financial economist for Scotiabank in Toronto, and before that as 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.



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.



ERIN GIBBS

**Portfolio Manager, Equities
S&P Investment Advisory Services**

Erin Gibbs oversees all S&P equity portfolio strategies, which include both North American and International jurisdictions. She also is responsible for developing the equity advisory business and quantitative portfolio research globally. She is a voting member of the

portfolio strategy committee, the group responsible for SPIAS' asset allocation recommendations. Prior to joining S&P in 2006, Gibbs held positions at Liberty Ridge Capital, Citigroup and Sanford Bernstein. She has more than 15 years of industry experience. Gibbs has a bachelor's degree in international management with a focus in finance from Pace University. She is a board member of the Society of Quantitative Analysts, a not-for-profit organization focused on education and communication to support members of the quantitative investment practitioner community.



GREGG S. FISHER, CFA

**Founder, Portfolio Manager &
Head of Research
Gerstein Fisher**

Gregg Fisher, CFA, founded Gerstein Fisher in 1993 and is responsible for the management and oversight of the firm's investment strategy and portfolio management, as well as spearheading the firm's many research projects on areas of

study that have included momentum, valuation and analyst growth models, and global investing. Several of his research papers have been published in academic journals including the Journal of Wealth Management, Journal of Investment Management, Journal of Investing, and Risk and Decision Analysis. A CFA® charterholder, Fisher is a member of the Institute for Quantitative Research in Finance (the Q Group), the CFA Institute, and the New York Society of Security Analysts. He serves on the advisory board for the Coalition for a Prosperous America and is on the board of several not-for-profit organizations. He earned a degree in finance from the University at Buffalo, where he now serves as a trustee for its endowment, and on the Dean's Advisory Council for the business school.



RICH HANLEY

**Associate Professor of Journalism
Quinnipiac University**

Rich Hanley shares his expertise as an associate professor of journalism at Quinnipiac University in Hamden, Connecticut, where he has been a faculty member since 2001. Hanley has worked for more than 25 years as a journalist, writer, professor and documentary film

producer, including a stint at Time magazine. He has covered global commodities markets, among other subjects, and years before Thomas Friedman's book, "The Lexus and the Olive Tree," Hanley wrote about the number of border crossings it took to move parts to a central place to manufacture single computers and a car for the news division of Prodigy Internet Services. He has received seven Emmy nominations for his work in television. At Quinnipiac, Hanley played an instrumental role in elevating the graduate journalism program to national prominence with a focus on multimedia journalism. He founded the graduate program in sports journalism to take advantage of Quinnipiac's location amid the cluster of sports broadcasting networks. He earned a bachelor's degree from the University of New Haven and a master's degree from Wesleyan University.



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. She focuses 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 reported on 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.

Keynote Speakers continued



ROBERT S. KAPLAN
President & CEO
Federal Reserve Bank of Dallas

Robert S. Kaplan has served as the 13th president and CEO of the Federal Reserve Bank of Dallas since Sept. 8, 2015. He represents the Eleventh Federal Reserve District on the Federal Open Market Committee in the formulation of U.S. monetary policy, and he oversees the 1,200 employees of the Dallas Fed. Kaplan previously was the Martin Marshall Professor of Management Practice and a senior associate dean at Harvard Business School. He is the author of several books, including “What You Really Need to Lead: The Power of Thinking and Acting Like an Owner.” Prior to joining Harvard in 2006, Kaplan was vice chairman of the Goldman Sachs Group, with global responsibility for the firm’s investment banking and investment management divisions. During his 23-year career at Goldman Sachs, Kaplan served in various other capacities, including head of the corporate finance department and head of Asia-Pacific investment banking. He became partner in 1990, and upon joining Harvard in 2006, Kaplan became a senior director of the firm. He earned a bachelor’s degree in business administration from the University of Kansas and a master’s in business administration from Harvard Business School.



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 Partners

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. 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.



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.



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 10 years, and in the top 25 for the past five 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.



STEPHANIE LINK
Managing Director & Head of Global Equities Research
Nuveen

Stephanie Link is the head of global equities research at Nuveen. She also manages a large-cap U.S. equities strategy for Nuveen's largest affiliate, TIAA Investments. Prior to joining the firm in 2015, Link spent seven years at TheStreet as chief investment officer and co-portfolio manager of Jim Cramer's Charitable Trust. Before that, she served for 10 years at Prudential Equity Group as managing director of institutional sales and director of research. She began her career at Dean Witter Reynolds in the institutional sales department. Link is an investment professional with 20-plus years of experience managing money, and her insights are frequently sought after for industry events and by the media. She is a CNBC contributor, appearing regularly on "Closing Bell" and "Fast Money Halftime." Link earned a bachelor's degree in finance at Boston College. She currently serves as chairperson for the Investment Advisory Council at the Basking Ridge Presbyterian Church in Basking Ridge, New Jersey.



BILL MILLER, CFA
Chairman & Chief Investment Officer
Miller Value Partners

Bill Miller, CFA, is chairman and chief investment officer of Miller Value Partners, LLC, and is the portfolio manager for MVPI, L.P. During his tenure as sole manager of the Legg Mason Value Trust, its performance exceeded its S&P 500 benchmark index for 15 consecutive years. He was named Fund Manager of the Year in 1998 by Morningstar, the greatest money manager of the 1990s by Money Magazine, was named by Barron's to its All-Century Investment Team (1999), and received the Sauren Golden Award in 2015. Miller was the director of research for Legg Mason from October 1981 to June 1985, and prior to joining Legg Mason, was treasurer of the JE Baker Company, a major manufacturer of products for the steel and cement industries. Miller earned an economics degree from Washington and Lee University. After, he served as a military intelligence officer overseas and then studied philosophy in the PhD program at Johns Hopkins University. Miller is also chairman emeritus of the board of trustees of the Santa Fe Institute, a leading scientific research laboratory.



KATE MOORE
Managing Director & Chief Equity Strategist
BlackRock

Kate Moore is the managing director and chief equity strategist for BlackRock and a member of the BlackRock Investment Institute. She is responsible for developing and delivering thought leadership on asset allocation and global equity markets as well as formulating tactical investment recommendations. Moore is a member of the firm's human capital committee and represents BlackRock's macro and market views across all channels and in the media. Prior to joining BlackRock, Moore was chief investment strategist for the Private Bank at J.P. Morgan. In this role, she set asset allocation and investment strategy for U.S. discretionary multi-asset portfolios and managed a macro equity strategy for private clients. Before joining J.P. Morgan, she was senior global equity strategist at Bank of America Merrill Lynch Global Research. Prior to that, she was an emerging markets strategist for Moore Capital Management. She earned a bachelor's in political and social thought from the University of Virginia and has a master's in political economy from the University of Chicago.



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

John Silvia is a former managing director and chief economist for Wells Fargo, based in Charlotte, North Carolina. He 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.



MARK STANDISH
Senior Partner
HHM Capital

Mark Standish has been a senior partner at HHM Capital since January 2017. Previously, he was a managing partner at Deimos Asset Management and, before that, president and co-CEO of Royal Bank of Canada (RBC) Capital Markets, co-group head of the Capital Markets Division, and was a member of the Group Executive Committee of RBC. Standish currently serves as a member of the board of directors of LightPoint Financial Technology. Originally from London, he studied banking and finance at Croydon College in England. He is actively involved with numerous charities in both New York and New Jersey. Standish lives in Sarasota, Florida, with his wife, Kim. Two of his four children, Carl and Craig, are Quinnipiac graduates.

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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.



RONALD TEMPLE, CFA
Managing Director, Co-Head of Multi-Asset &
Head of U.S. Equity
Lazard Asset Management

Ronald Temple, CFA, has developed a reputation as an authority on the global financial crisis and the secular changes under way in the global economy since joining Lazard in 2001. He oversees Lazard's multi-asset and U.S. equity strategies as well as several global equity strategies. Temple also engages extensively with Lazard's investment professionals across the equity and debt arenas to leverage the firm's insight broadly. He speaks frequently on economic and market-related topics, offering differentiated analysis and insights. Prior to joining Lazard, Temple was a director and buy-side equity analyst at Deutsche Bank AG. In a previous role at Deutsche Bank, he oversaw the implementation of merger-related synergies on behalf of the bank's CEO of the Americas after Deutsche acquired Bankers Trust. He earned a master in public policy from Harvard University and a BA in economics and public policy studies from Duke University.



JOSEPH M. TERRANOVA
Chief Market Strategist
Virtus Investment Partners

Joe Terranova is chief market strategist for Virtus Investment Partners. In this role, Terranova works with Virtus' regional sales teams and the financial advisors who sell the company's investment products. He has represented Virtus as a keynote speaker for several financial institutions and is a member of the Virtus Investment Oversight Committee. Prior to joining Virtus in 2008, Terranova spent 18 years at MBF Clearing Corp., where he became director of trading for the company and its subsidiaries. In this capacity, he managed more than 300 traders and support staff for MBF, one of the New York Mercantile Exchange's largest firms. Before joining MBF, Terranova held positions at Swiss Banking Corp. and JP Morgan Securities. He has been an ensemble member of the CNBC "Fast Money" franchise since 2008 and is the author of "Buy High, Sell Higher." He is also strongly committed to charitable causes benefiting children, including the 501(c) South Nassau Rock organization, which he founded and funds. Terranova earned a bachelor's degree in finance from the Peter J. Tobin College of Business at St. John's University in New York.



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.