G.A.M.E. FORUM

GLOBAL ASSET MANAGEMENT EDUCATION

Quinnipiac

UNIVERSITY

APRIL 3-4, 2025

NEW YORK MARRIOTT MARQUIS

HOLLY RAIDER, PHD
Dean, Quinnipiac University School of Business

A message from Dean Holly Raider, Quinnipiac School of Business

As dean of the Quinnipiac University School of Business, I am delighted to officially welcome you to the 2025 Global Asset Management Education (GAME) Forum and Portfolio Competition.

I am inspired by all of our student organizers for this year's high-impact event. I thank you on behalf of all attendees for your professionalism, tremendous hard work, and expertise in working with and attracting some of the world's foremost financial minds.

At the Quinnipiac University School of Business, we go beyond business as usual: We equip future entrepreneurs, marketers, financiers and other professionals with the tools, durable skills, practical experiences and insights they will need to thrive in a dynamic and interdependent business landscape. GAME Forum reflects our commitment to experiential learning and to the distinctly human qualities needed in business.

As the world's largest student-run financial conference, this annual event is specifically designed as a space where industry leaders can have an open exchange of ideas to spark students from around the globe to become the next generation of industry leaders. The whole GAME Forum community is cheering on the students competing in this year's Quinnipiac Global Portfolio Competition.

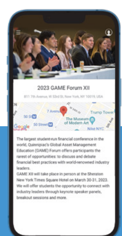
Quinnipiac has made a bold commitment to be the University of the Future with a strategic plan to prepare students for the careers and citizenship of tomorrow; create an inclusive, excellence-driven community; nurture and positively impact internal, local and global communities; and foster lifelong connections and success. These values underscore our commitment to convening this exceptional student conference and they are reflected in the Quinnipiac business education that defines the frontier of business fields with majors such as FinTech and with deep expertise that ranges from value investing to blockchain.

As we embark on this significant two-day conference in New York City, the financial capital of the world and our home away from home, we are putting the finishing touches on our new School of Business at Quinnipiac University on our beautiful Mount Carmel Campus in Connecticut. The state-of-the-art facility, beautifully designed by the award-winning global architects Pei Cobb Freed & Partners, will serve as a symbolic bridge between our proud history and our ambitious future with spaces such as the Financial Technology Center, Applied AI and Analytics Lab, Behavioral Insights Lab, and Innovation Hub. Our faculty, exemplified by Professor Osman Kilic, executive director of GAME Forum, fosters hands-on learning opportunities where students apply what they learn in the classroom. Through GAME Forum's open exchange of ideas, we ensure future business leaders can build connections and deepen their financial acumen.

Thank you for participating in GAME Forum and for being part of our global community dedicated to excellence in business education. I look forward to the promising future we will build together.

Sincerely,

OSMAN KILIC, PHD
Executive Director & Program Chair,
Professor of Finance,
Quinnipiac University
School of Business



SCAN TO DOWNLOAD THE GAME APP

qu.edu/gameapp

Welcome to the Quinnipiac University GAME Forum XIV

At our annual Quinnipiac University GAME Forum, current and emerging leaders in the financial services industry gather together to engage in meaningful discussions on the topical issues shaping the global investment environment.

We are enthused to be in NYC and honored to partner with over 100 speakers from more than 64 industry-leading financial services companies, presenting at our keynote panels, workshops and breakout sessions, as well as serving as judges for the highly anticipated global student-managed portfolio competition. This strong support positively influences our future leaders and their faculty mentors, represented by the 130+ universities, 140 faculty members and almost 1,200 students in attendance this year, aiding them in their professional development.

I would like to thank our student volunteers for their tireless efforts to make this unique event happen, as well as my esteemed colleagues in the Quinnipiac School of Business, Marketing & Communications and Alumni & Development for your collaboration and excellence.

The conference will commence with a fireside chat with Antony Ressler, co-founder, director and executive chairman of Ares Management Corporation, setting the stage for discussions led by 14 additional keynote speakers as they discuss their insights on the financial markets outlook and its effect on their asset allocation decision, portfolio investment and risk management strategies, given the backdrop of the current and foreseeable state of the U.S. and global economy. Students will have the opportunity to ask questions directly to our renowned panelists at the end of each session.

On the second day, attendees will participate in multiple concurrent breakout sessions with keynote panels and workshops focused on various topics, including asset allocation, portfolio management, AI and FinTech, women in finance, crypto assets and hedge funds, to name a few. We also will be hosting multiple post-college career networking events, which will give students the opportunity to directly meet with company representatives and GAME alumni.

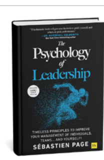
We look forward to seeing you again at Quinnipiac University's GAME Forum XV on March 19–20, 2026, in NYC. Additional information will be available at **game.qu.edu**, by emailing qgame@qu.edu or by calling 203-582-3888.

Kind regards,

AGENDA DAY ONE

DAY 1 *Thursday, April 3*

TIME	*VENUE*	*SESSION*
6:30–8:15 a.m.		***BREAKFAST***
8:30 a.m.	Ballroom	***WELCOME REMARKS*** **Debra J. Liebowitz,** PhD, Provost, Quinnipiac University **Holly Raider,** PhD, Dean, School of Business, Quinnipiac University
9–10 a.m.	Ballroom	***OUTSTANDING FINANCIAL CEO FIRESIDE CHAT*** **Antony Ressler,** Co-Founder, Director and Executive Chairman, Ares Management Corporation *MODERATOR* **Judy Olian,** PhD, President, Quinnipiac University
10–10:30 a.m.		***NETWORKING COFFEE BREAK***
10:30 a.m.–noon	Ballroom	***OUTLOOK FOR MARKETS AND INVESTMENT STRATEGIES*** *HOST* **Lisa Abramowicz,** Co-Anchor, Bloomberg Surveillance, Bloomberg Television and Radio *PANELISTS* **David Kelly,** CFA, PhD, Chief Global Strategist, J.P. Morgan Asset Management **Lauren Goodwin,** CFA, Chief Market Strategist, New York Life Investments **Kate El-Hillow,** President, Chief Investment Officer, Russell Investments
Noon–1 p.m.		***LUNCH BREAK***
1–1:30 p.m.		***EXHIBITOR VISITS***
1:30–3 p.m.	Ballroom	***OUTLOOK FOR U.S. AND GLOBAL ECONOMY IN 2025*** *HOST* **Tom Keene,** CFA, Anchor, Bloomberg Surveillance, Bloomberg Podcasts on YouTube *PANELISTS* **Blerina Uruçi,** Chief U.S. Economist, T. Rowe Price **Matthew Luzzetti,** Chief U.S. Economist, Deutsche Bank **Torsten Slok,** Chief Economist and Partner, Apollo Global Management Inc.
3:30–5 p.m.	Ballroom	***INVESTMENT RESEARCH REDEFINED: VOICES OF FEMALE EXECUTIVES*** *MODERATOR* **Holly Raider,** PhD, Dean, School of Business, Quinnipiac University *PANELISTS* **Joyce Chang,** Managing Director, Chair, Global Research, JPMorgan **Candace Browning,** Head of Bank of America Global Research, Vice Chair, Bank of America Institute **Lucy Baldwin,** Managing Director and Global Head of Research, Citi
5–6:15 p.m.	Ballroom	***THE PSYCHOLOGY OF LEADERSHIP FIRESIDE CHAT*** **Sébastien Page,** CFA, Head of Global Multi-Asset and Chief Investment Officer, T. Rowe Price *MODERATOR* **Brett Amendola,** Managing Partner, Wooster Square Advisors



Get a Signed Copy of Sébastien Page's New Book!
Students attending this session will receive a special code to claim a signed copy of *The Psychology of Leadership*. Visit **psychologyofleadership.net**, scroll to "Connect" and enter the code shared during the session under "Quick Message."

AGENDA DAY TWO

DAY 2 *Friday, April 4*

KEY
- Keynote Fireside Chat
- Keynote Panel
- Keynote Presentation
- Panel Discussion
- Workshop

TIME	VENUE	SESSION
6–7:45 a.m.		***BREAKFAST***
8–9 a.m.		***ATTEND ONE OF THE FOLLOWING SESSIONS***
	Astor Ballroom	***CHARTING THE PATH FORWARD: OPPORTUNITIES AND CHALLENGES IN INVESTMENT BANKING*** **Larry Hamdan,** Chairman, M&A – Americas, Barclays ***MODERATORS*** **Ross Kulaga,** Quinnipiac University **Grace Corfield,** Quinnipiac University
	Majestic	***SHAPING THE FUTURE: ADVANCING SUSTAINABLE INVESTMENT, ESG, AND IMPACT STRATEGIES*** ***MODERATOR*** **Margaret A. Goralski,** PhD, Professor of Entrepreneurship, International Business & Strategy, Quinnipiac University ***PANELISTS*** **Rob Du Boff,** CFA, Senior ESG Analyst, Bloomberg Intelligence **Nidhi Chadda,** Founder and CEO, Enzo Advisors LLC **Carleigh McFarlane,** Senior Manager, Sustainable Finance, UNGC
	Empire	***LAUNCHING YOUR CAREER AFTER COLLEGE: A GUIDE TO SUCCESS*** ***MODERATOR*** **Jill A. Koehler,** Associate Dean for Career Development, Quinnipiac University ***PANELISTS*** **Jeanette Tagliareni,** Campus Recruiting, Millennium **Hannah Del Vecchio,** Head of U.S. Client Onboarding, Transaction Banking, Goldman Sachs **Joe Lehocky,** Vice President: Campus Recruitment, HR, Credit Agricole CIB **Christa Short,** CFA, Head of Junior Talent Strategy and Associates Business Development, Citadel
	Broadway North	***HOW AI IS SHAPING THE ASSET MANAGEMENT INDUSTRY'S BUSINESS AND OPERATION*** ***HOST*** **Gaetano "Tony" DiPietro,** Managing Director of Corporate Strategy and Head of Client Relations, Piedmont Fund Services ***PANELISTS*** **Argyro (Iro) Tasitsiomi,** PhD, Head of AI and Investments Data Science, T. Rowe Price **Dillon M. Edwards,** Executive Director and AI Strategist, J.P. Morgan Asset Management Data Science Team **Christine Tu,** MD, Head of AI and Knowledge Management, Morgan Stanley
	Soho	***FIXED INCOME OUTLOOK: TRENDS, CHALLENGES AND OPPORTUNITIES*** ***MODERATOR*** **Eric McAlley,** Assistant Professor of Finance, Quinnipiac University ***PANELISTS*** **Steven Boothe,** CFA, Head of Investment Grade and Portfolio Manager, Fixed Income, T. Rowe Price **Riti Samanta,** PhD, Co-Head, North America Fixed Income and Systematic Fixed Income Portfolio Manager, Russell Investments

DAY 2 *Friday, April 4*

KEY
- 🟡 Keynote Fireside Chat
- 🔵 Keynote Panel
- 🔵 Keynote Presentation
- 🟠 Panel Discussion
- 🟢 Workshop

TIME	VENUE	SESSION
9:15–10:15 a.m.		***ATTEND ONE OF THE FOLLOWING SESSIONS***
	Astor Ballroom	***FUELING INNOVATION: THE ROLE OF CORPORATE VENTURE CAPITAL IN TECH GROWTH*** ***MODERATOR*** **LaToya Wilson,** Managing Director, Inclusive Investing, Morgan Stanley ***PANELISTS*** **Toan Huynh,** Co-Founder and Managing Partner, Alinea Ventures **Van Hamilton Barbeau,** AVP, Ochsner Ventures
	Broadway North	***THE GREAT DEBATE: ACTIVE VS. PASSIVE PORTFOLIO STRATEGIES*** ***MODERATOR*** **Raymond Bovich,** CFA, Partner/Wealth Manager, Wooster Square Advisors ***PANELISTS*** **Noah Kroll,** CIMA, Remi Product Specialist, Allspring Global Investments **Jasmine Fan,** CFA, Director, iShares Investment Strategy, BlackRock **Bobby Barnes,** Head of Quantitative Index Solutions, Fidelity
	Empire	***AI IN WEALTH MANAGEMENT: TRANSFORMING FINANCIAL STRATEGIES*** **Ted Koly,** Financial Advisor, Morgan Stanley **Marti Marache,** Founder and CEO, Harbor Asset Private Wealth
	Majestic	***BREAKING THE CODE: HOW OPTIONS REALLY WORK*** **Roma Colwell,** Associate Principal, Investor Education, OCC **Edward J. Modla,** Executive Director, Investor Education, OCC
	Soho	***PRIVATE CREDIT: A KEY DRIVER IN TODAY'S FINANCIAL ECOSYSTEM*** ***MODERATOR*** **Yury Marasanov,** CFA, Director, Private Credit, Angelo Gordon ***PANELISTS*** **Donal Smith,** Director, Asset Securitization, ING **Robert Schantz,** CFA, Vice President, Leverage Finance, ING
10:30–11 a.m.		***NETWORKING COFFEE BREAK***

TIME	VENUE	SESSION
11 a.m.–noon		ATTEND ONE OF THE FOLLOWING SESSIONS
	Broadway North	**GLOBAL OPPORTUNITIES IN ASSET ALLOCATION: FROM ALTERNATIVES TO EMERGING MARKETS AND BEYOND** MODERATOR **Katrina Dudley,** CFA, CAIA, Senior Vice President, Investment Strategist and Portfolio Manager, Franklin Templeton PANELISTS **Jitania Kandhari,** Deputy CIO - Solutions & Multi-Asset Group, Portfolio Manager - AIA, Head of Macro and Thematic Research - Emerging Markets, Morgan Stanley **Katherine S. Santiago,** CFA, Managing Director and Head of Quantitative Research, Multi-Asset Solutions Team, J.P. Morgan
	Majestic	**CORPORATE INVESTMENT BANKING** **Al Capra,** Managing Director and Head of Insurance Banking, Sumitomo Mitsui Banking Corporation (SMBC) **Nikhil Ghangurde,** Analyst, Global FIG, Sumitomo Mitsui Banking Corporation (SMBC)
	Empire	**THE CRITICAL ROLE OF INVESTOR RELATIONS IN ASSET MANAGEMENT** MODERATOR **Alexander V. Laskin,** PhD, Professor of Public Relations, Quinnipiac University PANELISTS **Dan McOsker,** AVP, Corporate Platforms, NASDAQ **Lori Chaitman,** Global Head of Investor Relations, Kyndryl **Alex Jorgensen,** Head of Investor Relations, Prosek
	Astor Ballroom	**REDEFINING SUCCESS: WOMEN'S IMPACT ON THE FUTURE OF FINANCE** MODERATOR **Sarah Almeida,** Quinnipiac University PANELISTS **Samantha Merwin,** CFA, Head of Markets & Investments Advocacy, BlackRock **Jessica Tomkiewicz,** Business Manager & COO, Stackman, Casriel Group, UBS **Jessica Iorio,** Divisional Operations Director, Rockefeller Global Family Office **Hannah Del Vecchio,** Head of U.S. Client Onboarding, Transaction Banking, Goldman Sachs
	Soho	**FIXED INCOME MARKETS OUTLOOK AND THE ROLE OF ETFS IN PORTFOLIOS** MODERATOR **Dennis Kilic,** Senior Manager, Credit Research, Aetna PANELISTS **David Braun,** MD, PM, PIMCO **Joyce Choi,** Head of Institutional Product Strategy, Fixed Income, BlackRock
11 a.m.–2 p.m.		**CAREER NETWORKING**
Noon–2 p.m.		**LUNCH BREAK**
12:30–5 p.m.	Broadway South	**PORTFOLIO COMPETITION POSTER SESSIONS** **Judges' visit 2–4 p.m.**

DAY 2 *Friday, April 4*

KEY
- Keynote Fireside Chat
- Keynote Panel
- Keynote Presentation
- Panel Discussion
- Workshop

TIME	***VENUE***	***SESSION***
2–3 p.m.		***ATTEND ONE OF THE FOLLOWING SESSIONS***
	Astor Ballroom	***EMERGING MARKETS: OPPORTUNITIES, CHALLENGES AND STRATEGIES*** ***MODERATOR*** **Steven Novakovic,** CAIA, CFA, Managing Director, CAIA ***PANELISTS*** **Samy Muaddi,** CFA, Head of Emerging Markets Fixed Income, T. Rowe Price **Steven Quattry,** Portfolio Manager, Next Gen Emerging Markets Strategy, Morgan Stanley **Olga Yangol,** CFA, CAIA, Managing Director and Head of EM Research & Strategy, Americas, Crédit Agricole CIB
	Broadway North	***EXPLORING DIGITAL ASSETS AND THEIR FUTURE IN INVESTING*** ***MODERATOR*** **Tan Gürpinar,** PhD, Assistant Professor of Business Analytics, Quinnipiac University ***PANELISTS*** **Jamie Pielock,** Head of Institutional Sales, EDX Markets **Brett Palatiello,** Head of Economic Research, Eigen Labs **Rian Rabinowitz,** Head of Business Development, Fhenix **David Han,** Institutional Research Analyst, Coinbase
	Soho	***ANALYZING GROWTH AND OPPORTUNITIES IN OPTIONS*** ***MODERATOR*** **Joe Burgoyne,** Chief Strategist, Delphian Trading ***PANELISTS*** **Ashok Yarlagadda,** Founder, Delphian Trading **Gary Franklin,** Vice President, Head of Options Trading and Strategies, Global Wealth Solutions, Raymond James **Brian Gilbart,** Head of Options Markets Development, NYSE **Kevin Luthringshausen,** Senior Vice President, Tradier Inc.
	Majestic	***FIXED INCOME DEAL-MAKING THROUGH COLLABORATION*** **Steven Barrett,** Managing Director, Credit Trader, MidOcean Partners **Tim DeVries,** Co-CEO, Securities, Clarksons
	Empire	***STRATEGIES FOR EQUITY RESEARCH: INSIGHTS AND BEST PRACTICES*** ***MODERATOR*** **Marilyn Rowland,** Director – Consultant Relations, Ninety One ***PANELISTS*** **Craig Siegenthaler,** CFA, Managing Director, Head of Asset Managers, Brokers and Exchanges, Bank of America **Victoria Konstantinova,** CFA, Assistant Portfolio Manager, Research Analyst, THB Asset Management

TIME	VENUE	SESSION
3:30–4:30 p.m.		ATTEND ONE OF THE FOLLOWING SESSIONS
	Broadway North	● ***THE FUTURE OF FINTECH AND INNOVATION: TRENDS AND OPPORTUNITIES*** *HOST* **Gaetano "Tony" DiPietro,** Managing Director of Corporate Strategy and Head of Client Relations, Piedmont Fund Services *PANELISTS* **Tim Rodgers,** Lead – Private Market Tokenization, The Depository Trust & Clearing Corporation (DTCC) **Nirbhay Kumar,** Advisor, Venture Capitalist and Accelerator
	Empire	● ***BEST PRACTICES ON CREATING AND TEACHING A STUDENT-MANAGED INVESTMENT FUND*** *MODERATOR* **Matthew O'Connor,** PhD, Professor of Finance, Quinnipiac University *PANELISTS* **Sergio Santamaria,** CFA, CMT, Finance Senior Instructor/Student Investment Fund Manager, Walton College of Business, University of Arkansas **Neveen Ahmed,** PhD, Assistant Professor of Finance, American University of Beirut **Andrea J. Heuson,** PhD, Professor of Finance and Academic Director of Real Estate Programs, University of Miami **Sebastian Lobe,** PhD, Associate Professor of Finance, University of Maine
	Majestic	● ***INSIDE THE BUY-SIDE: EXPLORING LONG/SHORT AT HEDGE FUNDS*** *MODERATOR* **Ross Kulaga,** Quinnipiac University *PANELISTS* **Taylor J. Zografakis,** Analyst, Ashler Capital, Citadel **Czarina Lokin,** Analyst, Millennium
	Soho	● ***FINANCE DESIGNATIONS*** *MODERATOR* **Sarah Auerbach,** CAIA, Head of Operations, Educational Programs, CAIA *PANELISTS* **Ian Schnoor,** CFA, CFM, Executive Director, Financial Modeling Institute **Rob Langrick,** CFA, CIPM, Chief Product Advocate, CFA Institute **Stanley Dash,** CMT, Program Director, CMT Association
5–6 p.m.	Astor	***GLOBAL PORTFOLIO COMPETITION – RECEPTION***

Acknowledgments:

We extend our sincere gratitude to the CFA Institute for generously funding 10 students to attend GAME Forum. Additionally, we appreciate FMI for sponsoring the Portfolio Competition, providing invaluable opportunities for our participants.

Make it your business to grab the bull by the horns.

In the Quinnipiac University School of Business, we see more than a student. We see someone who will impact the world.

From the construction of our new 79,000-square-foot, state-of-the-art School of Business facility opening this spring to the development of meaningful experiences that enhance learning, we provide the foundation to position our students for lifelong success. Every step of the way, we are invested in your future as a bold leader who will thrive in the evolving global environment.

Our commitment to helping students pursue their passion is clear. Over the past five years, we've boasted a proven track record with a 99% post-graduation placement rate, and recently added a STEM-designated Financial Technology (FinTech) major to our vast lineup of programs.

If you have a passion for business, we'll provide the tools for success. Together, we'll pursue work that matters.

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KEYNOTE SPEAKERS

Lisa Abramowicz

Co-Host, Bloomberg Television and Radio

Lisa Abramowicz co-hosts "Bloomberg Surveillance" on Bloomberg Television and Bloomberg Radio. She previously co-hosted "Bloomberg Markets" from 10 a.m.–noon EST on Bloomberg Radio and was a member of Bloomberg Television's on-air markets desk. She also served as a columnist and reporter at Bloomberg focusing on fixed income markets.

Abramowicz graduated from the University of Chicago.

Brett Amendola

Managing Partner, Wooster Square Advisors
Quinnipiac University Board of Trustees member

Brett M. Amendola has successfully leveraged his more than 30 years of experience at some of the world's largest investment firms. He has attracted successful financial industry professionals to work side by side with some of the brightest minds graduating from colleges and universities, creating a team with extensive knowledge and experience while providing world-class financial advice and continuity of service to professionals and multi-generational business owner clients. Amendola holds the Series 6, 7, 9, 10, 24, 63, 65 and state life and health licenses and is a member of GAMA International. He has been the recipient of numerous awards and honors, including Quinnipiac University's Outstanding Business Alumni Inaugural Recipient – 2008 and the Hartford Business Journal 40 Under 40 Award in 2008. Amendola earned a bachelor's degree in financial management from Quinnipiac University and serves on Quinnipiac's Board of Trustees.

Lucy Baldwin

Managing Director and Global Head of Research, Citi

Lucy Baldwin is a managing director and global head of research at Citi. Baldwin is responsible for managing Citi's global independent research across all asset classes.

Baldwin joined Citigroup in April 2021 from Credit Suisse, where she was global head of equity sales. Prior to Credit Suisse, Baldwin was at Bank of America as head of European equity sales (2015–19), and at Goldman Sachs as a director of European equity research and in a variety of research analyst roles (2006–15). Baldwin started her career at Cazenove as an equity research analyst covering the building materials sector. Baldwin graduated from the University of Birmingham with a degree in economics.

Baldwin serves as a member of Council for the University of Birmingham and sits on the Investment Sub-Committee. Additionally, Baldwin is a member of the Advisory Council for the Mossavar-Rahmani Center for Business and Government at the Harvard Kennedy School.

Van Hamilton Barbeau

AVP, Ochsner Ventures

Van Hamilton Barbeau is an AVP at Ochsner Ventures, the VC arm of Ochsner Health. Barbeau spent the majority of his career in investment banking in New York, most recently at Credit Suisse, where he advised on M&A, LBO, equity financing and debt financing transactions. Notable transactions Barbeau advised on in his time at Credit Suisse include VG Acquisition Corp.'s merger with 23andMe and Iora Health's acquisition by One Medical.

Prior to Credit Suisse, Barbeau launched the U.S. healthcare investment banking practice of Results International (acquired by Canaccord Genuity). In his time at Results International, his engagement in healthcare technology included advising on transactions in the cloud-based lab informatics and mobile VR/AR as well as the mobile design and development industries. Prior to his career in investment banking, he worked in economic development in New Orleans, where he was focused on developing the regional startup and healthcare ecosystems.

Barbeau holds a BA from Cornell University, an MBA from Cornell's SC Johnson Graduate School of Management and an MS from Weill Cornell Graduate School of Medical Sciences.

Keynote Speakers *continued*

Bobby Barnes

Head of Quantitative Index Solutions, Fidelity Investments

Bobby Barnes is head of the Quantitative Index Solutions (QIS) group at Fidelity Investments. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries and individuals.

QIS designs and manages proprietary indices covering equity, fixed income and multi-asset class investment vehicles. The index solutions created by the QIS group enable shareholders to gain unique market exposures via factor of thematic indices that leverage Fidelity's proprietary investment insights.

Prior to assuming his current position, Barnes was a quantitative analyst responsible for conducting alpha research to generate stock ideas. He also advised portfolio managers on portfolio construction techniques to manage risk.

Prior to joining Fidelity as a quantitative intern in 2008, Barnes worked as a systems engineer at Freescale Semiconductor and at NASA Ames Research Center. He has been in the financial industry since joining Fidelity full time in 2009.

Barnes earned his Bachelor of Science, summa cum laude, in electrical engineering from North Carolina State University and his Master of Science, magna cum laude, in electrical engineering from Stanford University. Additionally, he earned his Master of Business Administration from Harvard Business School.

Steven Boothe, CFA

Head of Investment Grade and Portfolio Manager, Fixed Income Division, T. Rowe Price

Steve Boothe has lead portfolio management responsibilities for the Global Investment Grade Corporate Bond, U.S. Investment Grade Corporate Bond and Dynamic Credit Strategies. He is a member of the Sector Strategy Advisory Group, with a focus on global and U.S. investment-grade corporate bond portfolios. Boothe is a co-president of the Investment Advisory Committee of the Corporate Income Fund and a member of the Investment Advisory Committees for the Investment-Grade Corporate Multi-Sector Account Portfolio, Global Multi-Sector Bond Fund, New Income Fund and Institutional International Disciplined Equity Fund. He is an Investment Advisory Committee member of the Institutional Income, International, Global and China Evolution Equity Funds. Boothe also is a member of the Fixed Income Steering and Global Trading Committees. He is a vice president of T. Rowe Price Group Inc. and T. Rowe Price Associates Inc.

Boothe's investment experience began in 1997, and he has been with T. Rowe Price since 1999, beginning as a credit research analyst covering the global telecommunications and technology industries in the fixed income division. After that, he became an investment-grade corporate portfolio manager. Prior to T. Rowe Price, Boothe was an associate at Raymond James Financial. Boothe is a Series 7 and 63–registered representative.

David Braun

Managing Director and Generalist Portfolio Manager, PIMCO

David Braun is a managing director and generalist portfolio manager in the New York office. He leads the U.S. financial institutions group (FIG) and stable value portfolio management teams. He is also a senior member of both the liability-driven investment and the U.S. core portfolio management teams. He oversees management of fixed income investment portfolios for institutional and retail clients. Prior to joining PIMCO in 2009, Braun was chief risk officer of a large investment company. He has 31 years of investment and financial services experience and holds an undergraduate degree in mathematics from the University of Connecticut. He is also a Fellow of the Society of Actuaries and a certified Financial Risk Manager.

Candace Browning

Head of BofA Global Research and Vice Chair, Bank of America Institute

Candace Browning is head of BofA Global Research, a group that provides clients and employees of Bank of America and Merrill Wealth Management with top-quality investment insights and ideas, and industry and company overviews. Browning also serves as vice chair of Bank of America Institute.

From 2003–08, Browning served as head of the Global Research Securities and Economics group at Merrill Lynch. She was named head of global research of Bank of America Merrill Lynch post the merger of the two firms.

Prior, Browning served as director of equity research for the Americas, with responsibility for all research coverage in Canada, the U.S. and Latin America. Previously, she served as deputy director, global research, Pan-Europe, for Merrill Lynch EMEA Research Management. Before joining research management, Browning covered the airline industry in the U.S. and was ranked in Institutional Investor's all-star analyst survey for 17 consecutive years.

Named one of the Top 25 Most Powerful Women in Finance by American Banker for the past 13 years, Browning joined Merrill Lynch in 1990 as a research analyst. She serves on the Board of Directors of the Atlantic Salmon Federation and on the Board of Trustees of the Wethersfield Foundation Inc.

Al Capra

Managing Director and Head of Insurance Banking, Sumitomo Mitsui Banking Corporation

Al Capra recently joined Sumitomo Mitsui Banking Corporation (SMBC) as a Managing Director and Head of Insurance Banking within its Global Financial Institutions Group. With a career on Wall Street that spans 30+ years, Capra is recognized as a seasoned and trusted advisor to insurance industry executives.

Capra is responsible for delivering corporate and investment banking solutions to domestic and foreign insurance clients. Prior to joining SMBC in 2023, he served as a Managing Director within Banking Americas at Mizuho Americas for eight-plus years. Prior to joining Mizuho in 2015, Capra spent 9 years at Société Générale where, as a Senior Banker, he developed and led the firm's U.S. Insurance Practice across Coverage & Investment Banking and Global Markets. Prior to becoming a banker in 2006, Capra covered the insurance industry as a sell-side equity research analyst for over 13 years. He began his career at Salomon Brothers in 1990.

Capra serves as a member of the Board of Directors for the Brookville Center for Children's Services. He has also committed time toward high school and college mentoring opportunities, including the NY STEPS Youth Mentoring Program for the Office of the Mayor of NYC, Wall Street Bound Inc. and iMentor.

Keynote Speakers *continued*

Nidhi Chadda

Founder and CEO, Enzo Advisors; Chief Impact Officer, Richmond Global Sciences (RGS)

Nidhi Chadda is a generalist growth investor and advisor across public and private markets, with 20+ years of experience as an investment banker, strategic consultant and investor. She is the founder and CEO of Enzo Advisors, a female- and minority-led sustainability consulting practice that helps companies build sustainable business models and works with institutional investors to integrate environmental, social and governance (ESG) policies and frameworks across their investment processes.

She is also the chief impact officer for Richmond Global Sciences, where she focuses on developing and executing business strategies aligned with market and customer insights. Prior to launching Enzo Advisors, Chadda was a portfolio manager at RBC Global Asset Management. Chadda also serves on several advisory boards and investment committees.

Chadda has hosted numerous webinars and has been featured across media engagements. Chadda is also an instructor for the Southern Gas Association and spearheaded the launch of the quarterly ESG Series on behalf of the board of the Harvard Business School Women's Association, which has hosted sold-out events since inception.

She is the recipient of the Impact Investment and Advisory Award (June 2024, NRI Achievers Awards) as well as the Outstanding Leadership in Finance Award (July 2023, MoRE 2.0 Conference).

Joyce Chang

Chair of Global Research, J.P. Morgan Chase

Joyce Chang has spent 35 years working in global research, with expertise in macro, fixed income, emerging markets, and geopolitical and strategic research. Before assuming her current role in 2019, Chang served as global head of research and global head of fixed income research. She began her career as an emerging markets strategist in 1990 and held top rankings in Institutional Investor surveys for emerging markets research, earning 25 No. 1 individual rankings. In 2014, she was inducted into the Fixed Income Analyst Society Hall of Fame.

Chang was a managing director at Merrill Lynch and Salomon Brothers prior to joining J.P. Morgan Chase in 1999. She is the executive sponsor for J.P. Morgan Chase's network for employees of Asian heritage (AsPIRE) and on the executive committee of the Corporate and Investment Bank's Women on the Move network. She serves on the Board of Directors of the German Marshall Fund, Trickle Up and the Fixed Income Analyst Society. She is also a member of the Council on Foreign Relations and Inter-American Dialogue. She has been named one of the Top 25 Most Powerful Women in Finance by American Banker and in Barron's 100 Most Influential Women in Finance.

Joyce Choi

Head of Institutional Product Strategy, BlackRock

Joyce Choi heads the institutional product strategy effort for BlackRock's U.S. iShares fixed income ETF business — responsible for the commercialization and adoption of fixed income ETFs, innovation through new products and the expansion of the ETF ecosystem — while partnering cross-enterprise and cross-industry to unlock new areas of fixed income ETF usage across institutions.

Prior to joining BlackRock in 2017, Choi was a founding partner at London-based Vinci Zafferano Capital (VZ Capital). In this role, she was responsible for managing and trading EM rates, FX, credit and equities. Before launching VZ Capital in 2012, Choi was an investment analyst at Tudor Investment Corporation, investing in public, private and distressed credit opportunities across global emerging markets.

Choi began her career as an investment analyst at Morgan Stanley, with coverage spanning across IG and HY in the U.S. and Asian corporates in Hong Kong.

Gaetano “Tony” DiPietro

Head of Corporate Strategy and Client Relations, Piedmont Fund Services

Tony DiPietro is the head of corporate strategy and client relations at Piedmont Fund Services, responsible for developing and executing strategic initiatives across the organization while optimizing operations, enhancing client services and improving financial performance.

DiPietro held several roles at BlackRock Inc. from 2003–19. He was a founding member and COO of the newly formed Fund of Hedge Fund Business (FOF) division. He provided leadership in the growth of the business which launched with $200 million in assets and grew to $3 billion across eight-plus types of products. DiPietro also developed the new client service team at BlackRock Inc., responsible for servicing the firm’s top 100 institutional clients. While developing the group, he further identified new client solutions and offered thought leadership to clients directly. Prior to joining Piedmont, DiPietro was executive director at S&P Global where he led the global customer service team for the tax solutions group within the Platforms and Regulatory Compliance (PRC) business.

DiPietro is a graduate of Quinnipiac University with a bachelor’s degree in international business. DiPietro resides in the greater Boston area with his wife and children.

Katrina Dudley, CFA, CAIA

Senior Vice President and Investment Strategist, Franklin Templeton

Katrina Dudley, CFA, CAIA, is a senior vice president and investment strategist in the Public Market Investments group at Franklin Templeton. Prior to her current role, Dudley was a portfolio manager at Franklin Mutual Advisers.

Dudley has a passion for advocating for women in finance and business and is actively involved with Girls Who Invest. At Franklin Templeton, she is the executive co-sponsor of the Women BRG. She is the co-author of “Undiversified: The Big Gender Short in Investment Management.” Dudley is a frequent media commentator on macro- and investment-related topics and has appeared on Bloomberg Surveillance, CNBC and Fox Business.

Within her community, Dudley is vice chair of the board of The Children’s Village, a board member of the Global Association of 100 Women in Finance and a member of the Management Advisory Committee of the NYU Michael Price Student Investment Fund.

Dillon Edwards

AI Strategist and Executive Director, J.P. Morgan Asset Management

Dillon M. Edwards, executive director, is an AI strategist on the J.P. Morgan Asset Management data science team. Based in New York, Edwards focuses on working closely with data scientists and key practitioners across asset management to identify, design and deliver AI solutions that will enhance the client experience. Prior to joining J.P. Morgan, Edwards was the vice president of analytics at Bizfi, a small business lending FinTech company, where he started and grew their business intelligence group. During this time, he implemented data visualization tools throughout the firm and oversaw statistical modeling efforts to automate the underwriting process and optimize marketing campaigns. He also led the due diligence process for a Series C equity raise and $100+MM debt restructuring. Edwards holds a BS from the University of Virginia in systems engineering and economics.

Keynote Speakers *continued*

Kate El-Hillow

President and Global Chief Investment Officer, Russell Investments

Kate El-Hillow serves as president and chief investment officer for Russell Investments, the global investment solutions provider founded in 1936 with $300 billion in assets under management. Based in New York, El-Hillow oversees all aspects of the investment division including asset management, implementation and research to deliver overall client investment solutions. She also serves on the firm's executive committee and chairs the operating committee that is responsible for ensuring activities across divisions align with the company's strategic vision and long-term goals. El-Hillow joined Russell Investments in 2021 and has more than 25 years of proven success in investment management roles. She has deep expertise in outsourced CIO investment solutions and multi-asset portfolio management.

Most recently, El-Hillow helped lead the multi-asset investment process and an investment team as deputy chief investment officer of multi-asset solutions with Goldman Sachs Asset Management. Prior, El-Hillow spent eight years at J.P. Morgan Chase & Co. where she held a variety of investment positions including a dual role as client portfolio manager and chief operating officer within the firm's asset allocation business.

A frequent guest speaker, El-Hillow shares her insights on global markets, whole portfolio solutions, investment governance, and implementation of multi-asset and multi-manager investing.

Brian Gilbart

Head of Options Markets Development, NYSE Group

Brian Gilbart is head of options markets development for NYSE Group, a part of Intercontinental Exchange (NYSE: ICE).

Gilbart oversees the management and development of NYSE Options business lines. He and his team are responsible for tracking transactional KPIs, performing revenue and market share modeling and optimization, and managing commercial policy and strategy for the NYSE's two options exchanges: Arca Options and Amex Options. Gilbart's previous roles at the NYSE include head of business analytics and director of options business development.

Prior, Gilbart was a proprietary options market maker with Belvedere Trading in Chicago. After more than a decade as a proprietary options trader, Gilbart subsequently managed all of Belvedere's independent implied volatility and delta one prop trading groups. He started his career with UBS Securities, trading on the ETF & Program Trading desk.

Gilbart's unique combination of front office trading and business management roles over a two-decade career give him expert credentials across the full breadth of the U.S. listed equity derivatives market.

Gilbart is a member of the STA Listed Options Committee, and an active member of the Security Traders Association of New York (STANY). He holds the Series 3, 7, 55, 56, 57 and 63 FINRA licenses.

Lauren Goodwin, CFA

Chief Market Strategist, New York Life Investments

Lauren Goodwin is an economist and the chief market strategist at New York Life Investments. She leads the firm's Global Market Strategy team and is responsible for economic and market research, asset allocation and thought leadership to empower investment decision-making.

Goodwin's research focuses on the investment implications of an evolving macroeconomic and capital markets environment. Goodwin is also a member of the Milken Institute Young Leaders Circle, a highly regarded program for select intellectually curious, motivated and philanthropic professionals. She regularly represents the firm as a keynote speaker at conferences and in television and print media outlets such as Bloomberg, CNBC, The New York Times, Nikkei and The Wall Street Journal.

Prior to joining New York Life Investments, Goodwin held economist positions at JPMorgan, Wells Fargo, Frontier Strategy Group and the OECD. She is a CFA® charterholder, graduated summa cum laude from the University of Southern California and holds a master's degree in international economics from Johns Hopkins.

Larry Hamdan

Head of Mergers and Acquisitions, Americas, Barclays

Larry Hamdan is head of mergers and acquisitions for the Americas within the U.K. investment bank at Barclays. Based in New York, he is also a member of the Americas Banking Operating Committee.

Prior to joining Barclays in 2010, he worked for 21 years at Credit Suisse, where he was vice chairman of global mergers and acquisitions. He also served as the global co-head of the industrial group.

Hamdan has extensive experience advising numerous clients on more than $500 billion of transactions, including Danaher on its $21 billion acquisition of GE's BioPharma division, US Airways on its $30 billion merger with American Airlines and TRW on its $12 billion hostile defense and sale to Northrop Grumman. Hamdan has also advised numerous clients facing demands from hedge fund activists.

He earned an AB in economics, magna cum laude, from Princeton University; a JD, magna cum laude, from Harvard Law School; and an MBA with high distinction from Harvard Business School, where he was a Baker Scholar.

Keynote Speakers *continued*

Toan Huynh

Managing Partner, Alinea Ventures

A former technology founder and digital transformation leader, Toan Huynh has experience in private equity and venture capital. She brings over 24 years of working with and investing in enterprise technology and services companies, with a practitioner's focus on those enabled by underlying innovation such as AI, data, cloud, quantum and blockchain. An early cloud computing evangelist, Huynh co-founded a cloud technology and services company called GlobalOne/Cloud Sherpas, which ranked No. 68 on 2013's Inc. Top 100 Firms and was subsequently acquired by Accenture in 2015 in its largest acquisition to date. Huynh was recently the U.S.-based partner for IVP, a Canada-based North American technology growth fund. She served as an entrepreneur-in-residence for global banks working with enterprise technology portfolio companies and launching new FinTech products.

Currently, Huynh serves as an operating advisor for several growth funds, a global bank and an investment bank, with a focus on operational excellence, GTM, human capital and product development. Over the past decade, Huynh has had broad board service experience, having served as independent director in public and private companies. She is recognized for her work in cloud technologies, corporate innovation and FinTech.

Jitania Kandhari

Deputy CIO of the Solutions and Multi-Asset Group, Morgan Stanley

Jitania Kandhari is the deputy CIO of the Solutions and Multi-Asset Group, co-lead portfolio manager for the Active International Allocation Strategy, and head of macro and thematic research for the Emerging Markets Equity team at Morgan Stanley.

She joined Morgan Stanley in 2006 and has 24 years of investment experience in global macroeconomics, country and market analytics, currencies and thematic investments. Kandhari was named in Citywire's Top 20 Female Portfolio Managers in the U.S. for 2021.

Prior to joining the firm, Kandhari was an associate vice president in private banking at ABN AMRO (Royal Bank of Scotland). Kandhari began her career in India at First Global Securities in Indian equities. She holds a Bachelor of Commerce in advanced financial and management accounting and an MMS in finance, both from the University of Mumbai.

Tom Keene, CFA

Anchor, Bloomberg Surveillance, Bloomberg Podcasts on YouTube

Tom Keene is the co-anchor of "Bloomberg Surveillance," Bloomberg Podcasts on YouTube. In addition to his work on "Bloomberg Surveillance," Keene provides economic and investment perspective to Bloomberg's various news divisions. Keene also founded the "Chart of the Day" article, available on the Bloomberg Professional Service. Keene is editor of "Flying on One Engine: The Bloomberg Book of Master Market Economists," published in 2005. (Two chapters appeared in the CFA Institute curriculum.) A graduate of the Rochester Institute of Technology, Keene is a Chartered Financial Analyst® and a member of the CFA Institute, National Association for Business Economics, the American Economic Association and the Economic Club of New York.

David Kelly, CFA, PhD

Chief Global Strategist, J.P. Morgan Asset Management

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

Throughout his career, Kelly has developed a unique ability to explain complex economic and market issues in a language that financial advisors can use to communicate with their clients. He is a keynote speaker at many national investment conferences and a frequent guest on CNBC and other financial news outlets.

Before joining J.P. Morgan Asset Management, he was an economic advisor 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 has an MA and PhD in economics from Michigan State University and a BA in economics from University College Dublin in Ireland.

Matthew Luzzetti

Chief U.S. Economist and Head of U.S. Economic Research, Deutsche Bank

Matthew Luzzetti is chief U.S. economist and head of U.S. economic research at Deutsche Bank in New York. He was previously an economist in DB's Office of the Chief Economist in London. In 2017, Luzzetti was named to Business Insider's Rising Stars on Wall Street Under 35. His research has appeared in several books on economic policy and in refereed macroeconomics journals.

Luzzetti holds a PhD in economics from the University of California, Los Angeles. While at UCLA, he worked at the U.S. Department of the Treasury in the Office of Financial Research. Prior to graduate school, he spent two years as a research analyst in the macroeconomics department at the Federal Reserve Bank of Philadelphia.

Samy Muaddi, CFA

Head of Emerging Markets Fixed Income, T. Rowe Price

Samy Muaddi is the head of emerging markets in the fixed income division. He is the portfolio manager of the Emerging Markets Bond Strategy and co-manages the Global High Income Bond Strategy. Muaddi also manages a range of customized separately managed accounts in emerging market debt and is a member of the Fixed Income Steering Committee.

He previously managed the firm's Emerging Markets Corporate Bond Strategy from 2015–24 and the firm's Asia Credit Bond Strategy from its inception until 2020. Muaddi also is a vice president of T. Rowe Price Group Inc., T. Rowe Price Associates Inc. and T. Rowe Price International Ltd.

Muaddi has been with T. Rowe Price since 2006, beginning as an associate analyst in the fixed income division. After that, he was a credit analyst and then an associate portfolio manager on the emerging markets team before assuming his current role.

Muaddi earned a BA, summa cum laude, in economics from the University of Maryland. He also has earned the Chartered Financial Analyst® designation. Muaddi is an adjunct professor at Georgetown University in the Walsh Graduate School of Foreign Service.

Keynote Speakers *continued*

Judy D. Olian, PhD

President, Quinnipiac University

Judy D. Olian is president of Quinnipiac University, an institution with approximately 9,000 undergraduate and graduate students, eight professional schools, a College of Arts & Sciences, 21 Division I athletic teams and graduates who achieve among the best employment outcomes in the country. The university is expanding its programs for both traditional and adult learners, is attracting diverse communities and innovative corporate partnerships, and is engaged in an ambitious set of capital projects.

Before joining Quinnipiac University, Olian served as dean of UCLA Anderson School of Management and John E. Anderson Chair in Management, dean and professor of management at the Smeal College of Business Administration at Pennsylvania State University, and professor and senior associate dean at the Smith School of Business at the University of Maryland. Olian also served as the chairman of the AACSB.

Among her other roles, Olian served or serves on various advisory boards including Peking University Business School's International Advisory Board, the Connecticut Workforce Council, the Business-Higher Education Forum, New Haven Promise, Hartford HealthCare, Catalyst and the Knight Commission on Intercollegiate Athletics, and chaired the Loeb Awards for Business Journalism.

She serves on the corporate boards of Ares Management LP, United Therapeutics and Mattel Inc.

Sébastien Page, CFA

Head of Global Multi-Asset and Chief Investment Officer, T. Rowe Price

Sébastien Page, CFA, is head of global multi-asset and chief investment officer at T. Rowe Price, where he oversees a team of investment professionals dedicated to a broad set of multi-asset portfolios. He is a member of the asset allocation committee responsible for tactical investment decisions across asset allocation portfolios. His multi-asset team manages $407 billion as of Aug. 31, 2022, including $337 billion in target date retirement products. He is also a member of the management committee.

Prior to joining T. Rowe Price in 2015, Page was an executive vice president at PIMCO, where he led a team focused on research and development of multi-asset solutions. Prior to that, he was a senior managing director at State Street Global Markets.

Page is the author of "Beyond Diversification: What Every Investor Needs to Know About Asset Allocation" (McGraw Hill, 2020) and the co-author of "Factor Investing and Asset Allocation" (CFA Institute Research Foundation, 2016). He is a member of the editorial board of The Journal of Portfolio Management and Financial Analysts Journal and the Research Committee of the Institute for Quantitative Research in Finance (Q Group).

Steven Quattry

Portfolio Manager, Morgan Stanley Investment Management

Steven Quattry is an investor on the Emerging Markets Equity team and a portfolio manager for the Next Gen Emerging Markets Strategy. He also focuses on thematic research and travels extensively to the frontier and emerging markets that he covers. He joined Morgan Stanley in 2011 and has 20 years of investment experience. Prior to joining the firm, Quattry was an analyst at Panda Global Advisors concentrating on economic and investment research. Previously, he was in the financial management program at GE Capital. Quattry received an MA from Columbia University in international affairs, with a focus on international economic policy, and a BA in finance from the University of Florida.

Holly J. Raider, PhD

Dean, School of Business, Quinnipiac University

Holly J. Raider is leading the Quinnipiac School of Business in planning a state-of-the-art new building, launching executive education and innovative new programs such as FinTech and Sport and Entertainment Management, and leading the capital campaign for the school. She serves on the executive committee of the partnership between Quinnipiac and Hartford HealthCare. Dean Raider is a member of the AACSB Business Practices Council.

An award-winning educator, Dean Raider has advanced the access, quality and impact of business education in a career spanning several distinguished business schools, including the Kellogg School of Management at Northwestern University, the Booth School of Business at the University of Chicago and INSEAD in France. Dean Raider has more than 25 years of experience as an educator and leader of collaborative global partnerships with corporations, government, healthcare systems, professional sports organizations and international universities.

Dean Raider is an expert in strategy, leadership change, business transitions and stakeholder engagement in high-stakes, turn-around situations. Dean Raider's article "How to Strengthen Your Network When You're Just Starting Out" was featured in HBR's special issue on the New Rules of Networking. Dean Raider was honored with a teaching award from Northwestern's Business Institutions Program and a Northwestern Wildcat Excellence Award.

Katherine Santiago, CFA

Managing Director, J.P. Morgan Asset Management

Katherine S. Santiago, managing director, is the head of quantitative research in the Multi-Asset Solutions team, responsible for the quantitative models that help establish the broad asset allocation reflected across the Multi-Asset Solutions team's portfolios globally. Currently based in New York and an employee since 2005, she is also a portfolio manager focusing on retirement drawdown strategies and tactical asset allocation across multi-asset portfolios. Previously, Santiago has worked in both New York and London as part of the research team and focused on developing inflation, retirement and alternative beta products. Santiago holds a BA in mathematics from Bowdoin College, an MS in mathematics in finance from New York University, and is a CFA® charterholder.

Keynote Speakers *continued*

Torsten Slok

Chief Economist and Partner, Executive Office in New York, Apollo Global Management

Torsten Slok joined Apollo Global Management in August 2020. Prior to joining the firm, Slok worked for 15 years on the sell-side, where his team was top ranked by Institutional Investor in fixed income and equities for 10 years, including No. 1 in 2019. Previously he worked at the Organisation for Economic Cooperation and Development (OECD) in Paris in the Money and Finance Division and the Structural Policy Analysis Division. Before joining the OECD he worked for four years at the International Monetary Fund (IMF) in the division responsible for writing the World Economic Outlook and the division responsible for China, Hong Kong and Mongolia.

Slok studied at the University of Copenhagen and Princeton University. He frequently appears in the media (CNBC, Bloomberg, WSJ, NYT, FT), and he has published numerous journal articles and reviews on economics and policy analysis, including in Journal of International Economics, Journal of International Money and Finance, and The Econometrics Journal.

Iro Tasitsiomi, PhD

Head of AI and Data Science, T. Rowe Price

Dr. Iro Tasitsiomi is the head of AI and data science at T. Rowe Price, where she's been instrumental in creating and integrating innovative investment signals with the firm's fundamental investing approaches. She also oversees the company's new AI labs and is responsible for formulating the strategy to adopt AI across the whole firm.

Tasitsiomi held significant roles at Forbes 500 companies such as Prudential Asset Management, Goldman Sachs and BlackRock. She started her finance career in quantitative finance, leading teams that developed investment/trading/risk management strategies.

Tasitsiomi has been a featured speaker at the Open Data Science Conference, Data Science Salon, The AI Summit, The Summit for Asset Management, the Financial Information Summit, Global CIO Institute, the AI and Finance Lecture Series and Quant Strats. She has been interviewed by The Economist, CIOReview magazine, the Chicago Sun-Times and the Chicago Chronicle.

She holds a PhD in astrophysics and an MS in physics from the University of Chicago, has served as a professor at Princeton University and is a well-published research author.

Christine Tu

Managing Director and Head of AI & Knowledge Management, Morgan Stanley

Christine Tu is a distinguished engineer and managing director, serving as the head of AI, ML and knowledge management in wealth management technology. She is a visionary leader, spearheading the Wealth and GenAI strategy and implementing GenAI-enabled applications for field users and various business lines. Tu also heads the GenAI Center of Enablement and oversees the development of the foundational GenAI framework and components that are leveraged across the firm.

Under her leadership, Tu and her team successfully implemented and rolled out the first GenAI application on Wall Street, a feat that earned them the prestigious Celent and Banking Tech Awards in 2024.

Before joining Morgan Stanley, Tu had a successful career at another financial institute, where she worked for over 20 years. Her extensive experience and innovative approach make her a key player in the field of technology and financial services.

Blerina Uruçi

Chief U.S. Economist, T. Rowe Price Fixed Income Division

Blerina Uruçi is a U.S. economist in the fixed income division at T. Rowe Price. She contributes to the formulation of investment strategy and supports investment and client development activities throughout the firm, specifically focusing on the outlook for the U.S. economy, inflation and monetary policy.

Uruçi's investment experience began in 2007. Before joining T. Rowe Price in 2022, Uruçi was a senior U.S. economist in the Washington, D.C., office of Barclays Capital. Previously, she was a European economist with Barclays' London office, where she was accountable for the U.K. market.

Uruçi earned a BSc with first-class honors in economics and politics from the University of Bath in Bath, England, and an MSc in economics from the London School of Economics and Political Science.

LaToya Wilson

Managing Director, Morgan Stanley

LaToya Wilson is the Americas head of the Morgan Stanley Inclusive Ventures Group. Wilson has over 20 years of experience in impact investing in both the public and private sectors. In her current role, Wilson is responsible for the Inclusive Ventures Lab, an in-house startup accelerator that promotes access to capital for early-stage technology and technology-enabled companies. In addition, Wilson is responsible for developing and executing commercial opportunities and strategies to achieve and maintain market and thought leadership with underrepresented founders. Wilson holds an undergraduate degree in finance from Quinnipiac University.

Olga Yangol, CFA, CAIA

Managing Director and Head of Emerging Markets Research & Strategy, Americas, Crédit Agricole Corporate and Investment Bank

Olga Yangol is a managing director and the head of emerging markets research and strategy, Americas at Crédit Agricole Corporate and Investment Bank. Based in New York, she is responsible for targeted EM research for institutional asset managers and regional research on Latin America. Prior to joining Crédit Agricole CIB, Yangol was a portfolio manager at HSBC Global Asset Management, focusing on emerging markets debt and currency strategies, and was the manager of the 2019 Lipper Award–winning Brazil Bond fund. Prior to HSBC, Yangol was at PIMCO where she advised large corporations on asset allocation and asset liability management. Prior to that, Yangol designed and traded cross-asset derivatives for corporations and asset managers as an executive director at CIBC World Markets. She earned an MBA from Massachusetts Institute of Technology and an undergraduate degree in information systems from McGill University.

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T. Rowe Price

Oversight Chair Letter

I'm honored to welcome you to GAME Forum XIV. Over the past year, I've had the privilege of leading a team of 49 student volunteers as we took on the shared responsibility of upholding the legacy of this premier event for aspiring financial professionals. It's been my most gratifying year at Quinnipiac and I'll always cherish the relationships we built and the memories we made.

As a native of Brookfield, Connecticut, my interest in studying at Quinnipiac was two-fold: I knew I wanted to pursue a meaningful career in business, and as an added bonus I got the opportunity to play Division I basketball close to home. I consider myself extremely fortunate to have been part of two great teams: the Bobcats and the GAME Forum committee. My predecessor, Aidan Greene '23, MBA '24, provided the blueprint that helped me guide my GAME team. And I'm proud to pass the proverbial headset to my successor, Robert Margiotta, who will no doubt build on the success of this year's event.

A 40-minute basketball game is often decided by one play that takes just a second or two to unfold. These are small yet pivotal moments where skill and effort meet opportunity. Life is like that. The business world certainly is, too. It's up to the individual to recognize and seize the moment when it presents itself.

Over these next few days, you will encounter lots of these little moments. You'll make connections that open pathways you never expected. My advice to you is to be present. Be open. Be ready to absorb the wisdom of the world's foremost financial minds. These next few days will be packed with "plays" that can change your trajectory. It's up to you to make the play.

Sincerely,

Quinn Guth

Quinn Guth '24, MBA '25

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Michael Surozenski

REGISTRATION
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Christopher Paul
Payton Orosco
Nichole Gomez
Noah Sussal

VIP
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Apoorva Kuppa
Josh Duval
Mia Miceli
Khadija Farooqi
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Olivia Torres
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EMCEES

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A Day in the Life of Quinn Guth

GAME Forum's Tireless "Point Guard"

It's a little after 1 p.m. on a Wednesday in late January when Quinn Guth '24, MBA '25, appears on the basketball court at M&T Bank Arena and starts hoisting shots. His first 3-point attempt snaps through the net, offering a glimpse of the shooting touch that made him an all-conference guard and a state champion at Immaculate High School in Danbury, Connecticut.

One of Guth's Quinnipiac teammates feeds him passes as he connects. Again and again.

The team-issued tank top under his powder-blue practice jersey reads, "We > Me," an ethos that bonds the Bobcats. But it's also an apt mantra for Guth's other team — the 49-member student volunteer committee for Quinnipiac University's Global Asset Management Education (GAME) Forum XIV.

"We take tremendous pride in GAME Forum being an event that's student-run," Guth says during a break in his balancing act. He's the student oversight chair for GAME Forum, a graduate student pouring himself into a prestigious and demanding role for much of the past year. And he's in his fourth year as a Bobcats reserve, suiting up for a first-place team just 35 miles from his hometown in Brookfield.

A string of injuries has limited his playing time, but Guth's competitiveness and affable nature endear him to his Bobcats teammates. Away from the court, on Zoom calls and in conference rooms, he is in complete command of the GAME Forum calendar, a point guard running the show with poise and precision.

"I mean, what do you say about this kid? He's just an incredible person," says Bobcats coach Tom Pecora. "Anything we've asked of him, he's done. He's on the dean's list. And he's in practice every day, competing and pushing his teammates to improve. No one's a better teammate."

Guth's schedule looks draining to the outside observer. But he lets it be known that he chose this.

"I'm never going to have another opportunity to be in college, run a club, play Division I basketball and earn a master's degree," Guth says. "So I always try to take the optimistic route whenever I do have long days."

"I'm never going to have another opportunity to be in college, run a club, play Division I basketball and earn a master's degree."

This long day is just getting started. Guth is in the shootaround portion of a 2 ½-hour block of basketball activities, the prelude to a high-intensity practice session for a Bobcats team hunting its first NCAA Tournament berth. Some of Guth's teammates linger after practice, but he has about 15 minutes to dress and drive to the Mount Carmel Campus, where a 3:30 p.m. lecture on investment and portfolio analysis awaits.

The pace Guth sets hardly surprises his parents, Ann and Kurt Guth. He's always had a daring streak, a little brother bravado. When Kurt coached older sister Taylor in middle school basketball, it wasn't enough for Quinn, then a third grader, to watch from the sidelines. He needed to join the layup line.

"He was always the kind of kid who, when he set his mind on something, he really locked in," says Kurt, who also coached Quinn's youth teams. "He's a pretty determined kid."

But a two-year prep school stint at Kimball Union Academy in Meriden, New Hampshire, tested Guth's resolve and shaped his future in unexpected ways. He suffered a torn ACL and endured a grueling rehab. Seasons were upended by the pandemic. He was also elected class president by his peers.

Despite the setbacks, the Guths saw their son blossoming into a leader.

"He would have been fine going straight to college from high school, but he really grew up during that period," Ann Guth says.

At Quinnipiac, more obstacles cluttered his path yet broadened his network. A second ACL injury, followed soon after by a serious foot injury, landed Guth in a lengthy rehab cycle once again. He befriended hockey players — fellow business majors — and flew to Tampa, Florida, to watch them triumph in the 2023 Frozen Four.

It was also around this time that Guth realized he was playing out of position. Not on the court, but in the classroom. He craved connection, that relationship-building element in business that mirrors team sports. With an assist from former Bobcats coach and Wall Street veteran Baker Dunleavy, Guth switched from an accounting major to an accelerated 3+1 finance student with a minor in accounting and enrolled in the MBA program.

"Enthralled" by his classmates' involvement in GAME Forum, Guth vowed to join their ranks however he could — always with an eye on holding a leadership position.

Juggling all this responsibility has never been an issue. It's a point of distinction for an athletic department that posted a collective GPA of 3.61 in the fall semester. "Coaching is easier here because of the caliber of student-athlete we bring in," Pecora says.

As the sun begins to set on this chilly winter Wednesday, Guth spends the evening in the Arnold Bernard Library prepping for the Securities Industry Essentials (SIE) exam. He needs to pass it for the job he's lined up in Manhattan just a few blocks from GAME Forum's host hotel. The seeds were planted last summer thanks to a connection with a former Quinnipiac basketball player Pecora once taught as a middle schooler.

Guth was interning in New York right up until it was time to begin offseason workouts with the Bobcats.

"I've always liked to put more on my plate and then figure it out from there," Guth says. "Sleeping until 10:30, watching Netflix and then going to class — that was never me. I always liked being super busy and doing things I had a passion for.

"I love the basketball team. I love GAME Forum. I love getting an education. Those are all things I'm excited to get out of bed and start doing."

Netflix can wait. Quinn Guth has a business world to conquer, one busy Wednesday at a time. Q

Staying Safe in NYC:

A Guide for 2025 GAME Forum Attendees

Welcome to the 2025 GAME Forum! We're excited to have you join us at the Marriott Marquis for this event. While New York City is an incredible place full of energy and culture, it's important to stay aware of your surroundings and make smart choices to ensure a safe and enjoyable experience at GAME. Below are some tips to help you stay safe both inside and outside the venue.

Safety at the Marriott Marquis

The Marriott Marquis is a secure venue, but here are some key safety measures for GAME attendees to be aware of:

Emergency Contacts:

- **Hotel Security:** Extension 6666 (Emergency)/Extension 8842 or 212-704-8842 (Non-Emergency)
- **Nearest Hospital:** Mount Sinai West – 1000 10th Ave (Between W 58th & W 59th Streets) – 212-523-4000
- **Nearest Fire Department:** Engine 54/Ladder 4 – 782 8th Ave (Between 48th & 49th Streets)
- **Nearest Police Stations:**
  - Midtown North Precinct: 54th St & 8th Ave – 212-767-8400
  - Midtown South Precinct: 35th St & 8th Ave – 212-239-9811

In-House Emergency Procedures:

- If an alarm sounds, wait for instructions before evacuating.
- Fire stairwells (A-B-C-D) are located on all four corners of the building and lead to 45th and 46th Streets.
- If needed, an Emergency Shelter-in-Place location is the 6th Floor Broadway Ballroom.
- In case of an evacuation, attendees may be directed to an off-site relocation at The Westin Times Square (270 W 43rd St & 8th Ave).

Personal Safety at the Event:

- **Be Mindful of Your Belongings:** Keep your phone, wallet and other valuables secure. Avoid leaving bags unattended.
- **Use Designated Entrances & Exits:** Always enter and exit through official hotel doors.
- **Report Suspicious Activity:** Notify event staff or hotel security if something feels off. "If You See Something, Say Something."
- **Stay in Groups:** Check in regularly with fellow GAME attendees.

Safety While Exploring NYC

New York City is a vibrant place, but like in any major city, it's important for GAME attendees to stay alert.

General Safety Tips:

- **Be Aware of Your Surroundings:** Keep your phone away while walking and avoid distractions like headphones.
- **Walk with Confidence:** Move with purpose and avoid stopping in isolated areas. If lost, step inside a store or hotel to check directions.
- **Use Well-Lit, Busy Streets:** Stick to main roads, especially at night.
- **Ignore Aggressive Panhandlers or Solicitors:** A simple "No, thank you" and walking away is the best approach. Avoid taking flyers or engaging with street vendors unless you're sure they are legitimate.
- **Keep Valuables Secure:** Carry bags close to your body, keep wallets in front pockets, and avoid displaying cash or expensive items.

Subway & Public Transportation Safety:

- **Stand Back on Platforms:** Stay behind the yellow line and avoid distractions near the edge.
- **Ride in Crowded Cars:** If traveling late at night, ride in a train car with more people and near the conductor's car.
- **Use Official Transportation:** Stick to MTA buses and licensed yellow taxis or reputable rideshare services (Uber, Lyft).
- **Verify Your Ride:** Check the driver's name, license plate and car details before getting into a rideshare.

Nighttime Precautions:

- **Avoid Walking Alone Late at Night:** Travel with a group or use a rideshare.
- **Stay in Populated Areas:** Avoid empty streets, alleyways and parks at night.
- **Trust Your Instincts:** If something doesn't feel right, leave the area immediately.

Emergency Contacts & Local Resources:

- **In an Emergency:** Dial 911 for police, fire or medical emergencies.
- **Non-Emergency NYC Assistance:** Dial 311 for general city services.
- **Closest 24-Hour Pharmacy:** CVS – 241 W 57th St at 8th Ave – 212-247-5848
- **Walk-in Medical Clinic:** Available upon request at the hotel concierge.

We want all GAME Forum attendees to have a fantastic and safe experience in NYC. By staying aware and using common sense, you can enjoy everything the city has to offer while keeping yourself and those around you secure.

We are proud to support The Quinnipiac University GAME Forum.

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