NEW YORK, NY

MARCH 30–31, 2023

Quinnipiac UNIVERSITY

G.A.M.E. FORUM

Global Asset Management Education

SHERATON NEW YORK

TIMES SQUARE HOTEL

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 2023 Global Asset Management Education (GAME) Forum and Portfolio Competition.

Congratulations to all of our student organizers for the exceptional and thoughtful design of this year's program, and for your professionalism and expertise in working with and attracting some of the world's most influential industry leaders and experts to the program. Good luck to students competing in this year's Global Portfolio Competition.

As the world's largest student-run finance conference, this annual event is specifically designed as a space where the top minds in the field can have an open exchange of ideas to inspire and develop students from around the globe and who are the next generation of industry leaders.

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, practical experiences and insights they will need to thrive in a quickly evolving business landscape. We take pride in our distinctive hands-on experiential learning and real-world, practical preparation as part of our holistic approach to business education.

GAME Forum is a testament to how our School of Business mission and values align with the concept of business as an agent of positive change through the sharing of global perspectives and industry knowledge. Our faculty, exemplified by Professor Osman Kilic, Executive Director of GAME Forum, fosters real-world learning opportunities for students to expand on what they learn in the classroom. Through GAME Forum's open exchange of ideas, we ensure future business leaders are able to build connections and deepen their finance acumen.

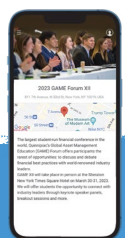
Our university has made a bold commitment to be the University of the Future with a strategic plan to prepare students for the careers and citizenship of tomorrow; create an inclusive, excellence-driven community; nurture and positively impact internal, local and global communities; and foster lifelong connections and success. These are the very same principles highlighted throughout this year's GAME Forum.

Thank you for participating in the GAME Forum and for being part of our community dedicated to excellence in global 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



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Welcome to the Quinnipiac University GAME Forum XII

At our annual Quinnipiac University GAME Forum, current and future leaders of the financial services industry gather together to explore and discuss the topical issues our global investment environment faces.

We are enthused to be back in NYC for an in-person conference experience and proud to partner with over 100 speakers from more than 77 industry-leading financial services companies, presenting at our keynote panels, workshops and breakout sessions, as well as serving as judges for the annual student-managed portfolio competition. This strong support positively influences our future leaders and their faculty mentors, represented by the 120+ universities, 100+ faculty members and 1,100+ 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 colleagues in the Quinnipiac School of Business, Marketing & Communications and Alumni & Development for devoting time and resources.

On the first day of the conference, we will host 15 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, we will host multiple concurrent breakout sessions with keynote panels and workshops focused on various topics, including asset allocation, portfolio management, FinTech, women in finance, crypto assets and hedge funds, to name a few. For the first time this year, 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 hope to see you again at Quinnipiac University's GAME Forum XIII on March 21–22, 2024, 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 1

DAY 1 Thursday, March 30

KEY
- ● Keynote Panel
- ● Keynote Presentation
- ● Panel Discussion
- ● Workshop

TIME	VENUE	SESSION
6–7:45 a.m.	Empire Ballroom	***BREAKFAST***
8 a.m.	Metropolitan Ballroom	***WELCOME FROM QUINNIPIAC UNIVERSITY*** **Holly Raider**, Dean, School of Business, Quinnipiac University **Judy D. Olian**, President, Quinnipiac University
8:30–10 a.m.	Metropolitan Ballroom	● ***ECONOMIC OUTLOOK FOR 2023 AND BEYOND*** *HOST* **Tom Keene**, CFA, Co-Anchor, Bloomberg Surveillance, Bloomberg Television and Radio *PANELISTS* **Michael Gapen**, Managing Director, Chief U.S. Economist, BofA Global Research **Lisa Embso-Mattingly**, CBE, Managing Director of Research, Global Asset Allocation, Fidelity Investments **Blerina Uruçi**, Chief U.S. Economist, T. Rowe Price **Dana M. Peterson**, Chief Economist, The Conference Board
10–10:30 a.m.	Central Park Ballroom	***COFFEE BREAK***
10:30 a.m.–noon	Metropolitan Ballroom	● ***OUTLOOK FOR MARKETS AND INVESTMENT STRATEGIES*** *HOST* **Peter Spiegel**, U.S. Managing Editor, The Financial Times *PANELISTS* **Jimmy C. Chang**, CFA, Chief Investment Officer, Rockefeller Global Family Office **David Kelly**, CFA, Chief Global Strategist, J.P. Morgan Asset Management **Celia Dallas**, Chief Investment Strategist, Cambridge Associates **Darren Wolf**, CFA, Senior Investment Manager and Global Head of Investments, AIS, abrdn
Noon–1 p.m.		***EVENT BREAK*** *Attendees are encouraged to explore the city and local eateries during this time.*
1–2 p.m.	Central Park Ballroom	***EXHIBITOR VISITS***
2–3:30 p.m.	Metropolitan Ballroom	● ***GLOBAL ASSET ALLOCATION AND PORTFOLIO RISK*** *MODERATOR* **Brett Amendola**, Managing Partner, Wooster Square Advisors *PANELISTS* **Sébastien Page**, CFA, CIO and Head of Global Multi-Asset, T. Rowe Price **Bill Irving**, CIO, Global Asset Allocation, Fidelity Investments **Stacey Gilbert**, Chief Investment Officer, Glenmede Investment Management **Jitania Kandhari**, Deputy CIO – Solutions & Multi-Asset Group, Portfolio Manager – AIA, Head of Macro and Thematic Research – Emerging Markets, Morgan Stanley
3:30–4 p.m.	Central Park Ballroom	***EXHIBITOR VISITS***

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DAY 1 Thursday, March 30 *(cont.)*

KEY
- Keynote Panel
- Keynote Presentation
- Panel Discussion
- Workshop

TIME	VENUE	SESSION
4–5 p.m.		***ATTEND ONE OF THE FOLLOWING SESSIONS***
	Metropolitan Ballroom	● ***LIFE IN THE WORKFORCE*** **Hear from former GAME Alumni on how to successfully navigate your career post graduation.** **Matthew Bray**, Associate, Chiltern Street Capital **Megan Martucci**, Senior Financial and Data Analyst, Sportradar **Amanda Morales**, Financial Representative, National Financial Network **Sevket Mete Seker**, VP, ABS Financing and Securitization, Citi **Dennis Kilic**, Senior Manager, Credit Research, Aetna
	Empire Ballroom East	● ***LIFE IN THE WORKFORCE*** **Hear from former GAME Alumni on how to successfully navigate your career post graduation.** **Taylor Zografakis**, Senior Analyst, Millennium **Jessica Tomkiewicz**, Senior Relationship Manager, Chief of Staff, UBS **Jordan Marino**, CFA, CAIA, Investment Adviser Representative, Connecticut Capital Management Group **Chris Gosselin**, Insurance Program Lead, Oyster Technologies **Abigail Gibbons**, Registered Wealth Management Client Associate, The Balducci Group, BAC
	Empire Ballroom West	● ***WSJ PROFESSOR TOOLS WORKSHOP***

SAVE THE DATE

March 21–22, 2024 | New York, New York

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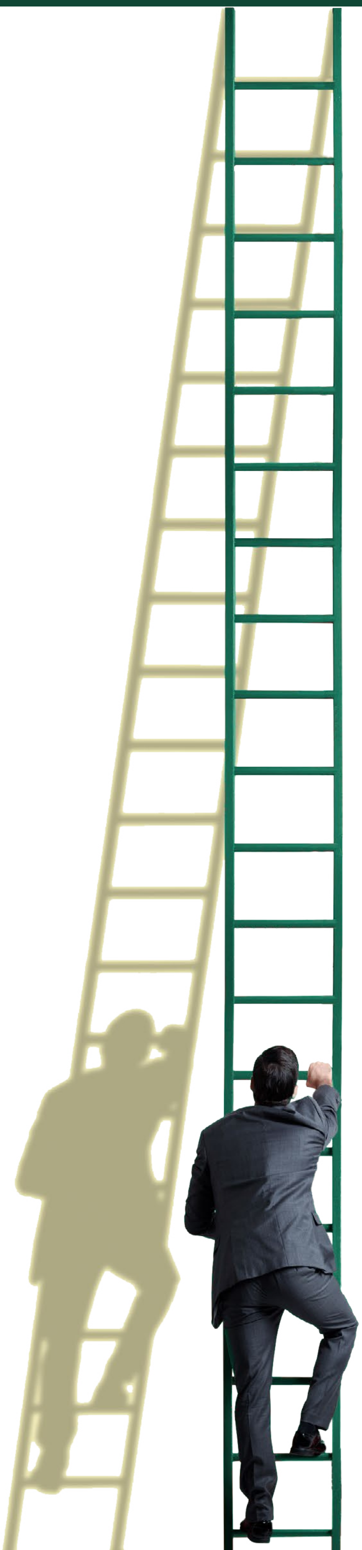
203-582-3888

Quinnipiac UNIVERSITY

G.A.M.E. FORUM

Global Asset Management Education

You could climb the corporate ladder.
But why not take the elevator?



If you're looking to accelerate your career then look into our **Management Development Program**. You'll have opportunities to expand your experience by working with groups from different business lines. The ability to work with professionals across all levels of our company. And a voice to help us improve the lives of customers we serve and the communities we live in.

Combined, M&T Bank and Wilmington Trust are one of the most successful companies in the U.S. financial services industry. **To get your career on a fast track, meet our representatives in the GAME Forum sponsor area. Ask about our internship and employment opportunities to join our team today. Because the sooner you get started, the faster you can achieve success.**

M&T Bank
Official Banking Partner, Quinnipiac University

AGENDA DAY 2

DAY 2 Friday, March 31

KEY
- ● Keynote Panel
- ● Keynote Presentation
- ● Panel Discussion
- ● Workshop

TIME	VENUE	SESSION
5:30–7:30 a.m.	Metropolitan Ballroom East	***BREAKFAST***
8–9 a.m.		***ATTEND ONE OF THE FOLLOWING SESSIONS***
	Metropolitan Ballroom West	● ***INVESTMENT BANKING OUTLOOK: CHALLENGES AND OPPORTUNITIES*** **Larry Hamdan**, Head of M&A – Americas, Barclays
	Empire Ballroom East	● ***ESG: THE IMPORTANCE OF GOVERNANCE AND IMPACT INVESTING*** *MODERATOR* **Alexandra Scaggs**, Alphaville Correspondent, The Financial Times *PANELISTS* **Rob Du Boff**, CFA, Senior ESG Analyst, Bloomberg Intelligence **Jessica Long**, Real Estate Trade Association **Steve Norcini**, Head of Sustainable Investing, Wilmington Trust – M&T Bank
	Gramercy	● ***HOW TO START YOUR CAREER AFTER COLLEGE*** *MODERATOR* **Jill A. Koehler**, Associate Dean for Career Development, Quinnipiac University *PANELISTS* **Hannah Del Vecchio**, Vice President, Transaction Banking, Goldman Sachs **Joe Lehocky**, Vice President Campus Recruitment, HR, Credit Agricole CIB **Katie Strong**, Campus Recruiting Manager, Morgan Stanley
	Bowery	● ***HOW TO USE TRADING SYSTEMS IN TEACHING*** *MODERATOR* **Joe Burgoyne**, Chief Strategist, Delphian Trading *PANELISTS* **Ashok Yarlagadda**, Founder, Delphian Trading **Bachir Chehab**, Associate Director, BMO Financial Group Finance Research and Trading Lab, Rotman School of Management, University of Toronto
	Empire Ballroom West	● ***HEDGE FUND AND PRIVATE EQUITY: INTRO TO CARRIED INTEREST VALUATION*** **Vladimir Korobov**, CPA, Partner, Valuation & Litigation Support, Marcum
9:15-10:15 a.m.		***ATTEND ONE OF THE FOLLOWING SESSIONS***
	Metropolitan Ballroom West	● ***MACRO OUTLOOK AND INVESTMENT STRATEGIES FOR 2023 AND BEYOND*** *MODERATOR* **Tyler K. Wood**, CMT, Managing Director, CMT Association *PANELISTS* **Jurrien Timmer**, CMT, Director of Global Macro, Fidelity Investments **James Bianco**, CMT, President, Bianco Research
	Empire Ballroom East	● ***PORTFOLIO MANAGEMENT: ACTIVE VS. PASSIVE MANAGEMENT*** *MODERATOR* **Raymond Bovich**, CFA, Partner/Wealth Manager, Wooster Square Advisors *PANELISTS* **Noah Kroll**, CIMA, Remi Product Specialist, Allspring Global Investments **Jasmine Fan**, CFA, Vice President, BlackRock iShares Investment Strategy Team **Bobby Barnes**, Head of Quantitative Index Solutions, Fidelity Investments

DAY 2 Friday, March 31 *(cont.)*

TIME	VENUE	SESSION
9:15–10:15 a.m. (cont.)	Bowery	● ***WEALTH MANAGEMENT STRATEGIES*** *MODERATOR* **Ted Koly**, Financial Advisor, Morgan Stanley *PANELISTS* **Joseph Chu**, CFP, Managing Director, Financial Advisor, Senior Portfolio Manager, RBC Wealth Management **Alli McCartney**, Managing Director, Private Wealth Advisors, UBS
	Empire Ballroom West	● ***OPTION STRATEGIES FOR RISK MANAGEMENT AND INCOME GENERATION*** **Joe Burgoyne**, Chief Strategist, Delphian Trading **Joshua Smithberger**, Chief Trading Strategist, System Soft Technologies
	Gramercy	● ***REAL ESTATE MARKET OUTLOOK AND INVESTMENT STRATEGIES*** *MODERATOR* **Peter Falcone**, Vice President, CMBS Originations, JPMorgan *PANELISTS* **Avivah Hotimsky**, Principal, Real Estate, KKR **Peter (Pearce) Minshall**, Senior Associate, Partners Group **Christina Maloomian Smith**, Vice President, Merit Hill Capital
10:30–11 a.m.	Central Park Ballroom	***COFFEE BREAK***
11 a.m.–noon		***ATTEND ONE OF THE FOLLOWING SESSIONS***
	Bowery	● ***ROLE OF ALTERNATIVE INVESTMENTS IN ASSET ALLOCATION*** *MODERATOR* **Burton Sheaffer**, Assistant Professor of Professional Practice, Rutgers Business School *PANELISTS* **Jim Wiederhold**, Director of Commodities and Real Assets, S&P Global **Lowell Yura**, Head of Multi-Asset Solutions, T. Rowe Price **Jordan Strauss**, Senior Equity Portfolio Manager/Team Leader and Senior Vice President, WISD Wealth Management
	Metropolitan Ballroom West	● ***EMERGING MARKETS INVESTMENT OUTLOOK AND PORTFOLIO STRATEGIES*** *MODERATOR* **Steven Novakovic**, CAIA, CFA, Managing Director, CAIA *PANELISTS* **Aroop Chatterjee**, Global Macro Strategist, Foreign Exchange and Emerging Markets, MD, Wells Fargo **Anupam Damani**, MD, Co-Head of Global Fixed Income Portfolio Management, Head of International & Emerging Market Debt Strategy, Nuveen TIAA **Steven Quattry**, Portfolio Manager for NextGen Emerging Markets, Morgan Stanley
	Empire Ballroom West	● ***EVOLUTION OF DIGITAL ASSETS MARKETS AND INFRASTRUCTURE*** **Ramine Bigdeliazari**, Director – Fidelity Digital Assets, Fidelity Investments

KEY | ● Keynote Panel ● Keynote Presentation ● Panel Discussion ● Workshop

TIME	VENUE	SESSION
11 a.m.–noon (cont.)	Gramercy	● ***WOMEN IN FINANCE: OPPORTUNITIES & CHALLENGES*** *MODERATOR* **Dayna Blechman**, VP, Head of Business Operations, NBA *PANELISTS* **Donna Mills-Lambeth**, Director, Charles Schwab **Mary Ryan**, Executive Director, Trading, E*TRADE from Morgan Stanley **Hannah Del Vecchio**, Vice President, Transaction Banking, Goldman Sachs **Samantha Merwin**, CFA, Head of ETF and Index Investing, BlackRock
	Empire Ballroom East	● ***HEDGE FUND INDUSTRY OUTLOOK: OPPORTUNITIES AND CHALLENGES*** **Evan H. Katz**, Managing Director, Crawford Ventures, Inc. **Anthony Scaramucci**, Founder and Managing Partner, Skybridge
11 a.m.–2 p.m.	Central Park Ballroom	***CAREER NETWORKING***
Noon–2 p.m.		***EVENT BREAK*** *Attendees are encouraged to explore the city and local eateries during this time.*
2:30–5 p.m.	Carnegie West	***PORTFOLIO COMPETITION POSTER SESSIONS***
2–3 p.m.		***ATTEND ONE OF THE FOLLOWING SESSIONS***
	Empire Ballroom East	● ***CAPITAL ALLOCATION*** **David Giroux**, Chief Investment Officer, Head of Investment Strategy, Portfolio Manager, T. Rowe Price
	Metropolitan Ballroom West	● ***DeFi: BLOCKCHAIN, CRYPTOCURRENCIES AND NFT*** *MODERATOR* **Christopher Gambella**, Vice President, Global Investment Manager Analysis, Morgan Stanley *PANELISTS* **David Duong**, Head of Institutional Research, Coinbase **Jeanine Hightower-Sellitto**, Chief Strategy Officer, EDX Markets **Amy Oldenburg**, Managing Director, Head of Emerging Market Equity, Morgan Stanley
	Bowery	● ***COVERING WALL STREET*** *MODERATOR* **Chris Roush**, Dean, School of Communications, Quinnipiac University *PANELISTS* **Lauren Tara LaCapra**, Wall Street Reporter, The Information **Rebecca Ungarino**, Senior Finance Reporter, Business Insider **Sujeet Indap**, Wall Street Editor, The Financial Times
	Gramercy	● ***WOMEN IN THE FINANCIAL SERVICES INDUSTRY*** *MODERATOR* **Marilyn Rowland**, Senior Research Analyst, Fiducient Advisors *PANELISTS* **Lesley Leonhardt**, Vice President, Fidelity Investments **Geralyn Endo**, Relationship Manager/Options Lead, MEMX **Jessica Tomkiewicz**, Senior Relationship Manager, Chief of Staff, UBS **Caroline King**, Financial Representative, Northwestern Mutual
	Empire Ballroom West	● ***INSTITUTIONAL TREND-FOLLOWING PORTFOLIO MANAGEMENT SIMPLIFIED*** **Tyler K. Wood**, CMT, Managing Director, CMT Association

DAY 2 Friday, March 31 *(cont.)*

KEY
- Keynote Panel
- Keynote Presentation
- Panel Discussion
- Workshop

TIME	VENUE	SESSION
3:30–4:30 p.m.		***ATTEND ONE OF THE FOLLOWING SESSIONS***
	Metropolitan Ballroom West	● ***FINANCIAL TECHNOLOGY AND INNOVATION*** *MODERATOR* **Gaetano Tony DiPietro**, Financial Services Executive *PANELISTS* **Elaine Villas-Obusan**, Head of Retail Marketing, U.S., Amundi Asset Management **Nirbhay Kumar**, Institutional FinTech Innovation Accelerator and Advisory Board Member for FinTech Founders & VCs **Alessandro Vigilante**, Vice President, FinTech and Emerging Businesess, Fidelity Investments **Stefania Di Bartolomeo**, Founder, CEO, Physis Investment
	Empire Ballroom East	● ***ANALYZING GROWTH & OPPORTUNITIES IN OPTIONS*** *MODERATOR* **Joe Burgoyne**, Chief Strategist, Delphian Trading *PANELISTS* **Gary Franklin**, Vice President, Head of Options Trading & Strategies/Executive Compensation Services, Raymond James **Ashok Yarlagadda**, Founder, Delphian Trading **Kevin Luthringshausen**, Senior Vice President, Tradier, Inc. **Brian Gilbart**, Director, Options Business Development, NYSE
	Bowery	● ***FACULTY BEST PRACTICES ON HOW TO CREATE A SMIF AND TEACH IT*** *MODERATOR* **Asli Ascioglu**, Professor and Chair of Finance Department, Bryant College *PANELISTS* **Mary V. Papazian**, Managing Director, Mucci Capital Markets Lab, Merrimack College **Daniel Kapusta**, Professor and Director of Davis Center for Portfolio Management, University of Dayton **Derek Horstmeyer**, Professor of Finance and Co-Founder & Director of the GMU SMIF, George Mason University
	Empire Ballroom West	● ***ENTREPRENEURSHIP FINANCE*** *MODERATOR* **Patrice Luoma**, Professor of Entrepreneurship and Strategy, Quinnipiac University *PANELISTS* **Joseph O'Connor**, Member, Angel Investor Network of CT **Bobak Emamian**, Co-Founder, Debut Capital **Tony Cerce**, CEO, ProsperOn
	Gramercy	● ***FINANCE DESIGNATIONS*** *MODERATOR* **Steven Novakovic**, CAIA, CFA, Managing Director, CAIA *PANELISTS* **Tyler K. Wood**, CMT, Managing Director, CMT Association **Lisa S. Ponti**, Vice President, Educational Outreach, GARP
5–6 p.m.	Metropolitan Ballroom East	***GLOBAL PORTFOLIO COMPETITION AWARD CEREMONY***

KEYNOTE SPEAKERS

BRETT M. 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. He earned a bachelor's degree in financial management from Quinnipiac University and serves on Quinnipiac's Board of Trustees.

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.

JIM BIANCO
President, Bianco Research

Jim Bianco, CMT, is president and macro strategist at Bianco Research, LLC. Since 1990, Bianco's commentaries have offered a unique perspective on the global economy and financial markets. Unencumbered by the biases of traditional Wall Street research, Bianco has built a decades-long reputation for objective, incisive commentary that challenges consensus thinking. In nearly 20 years at Bianco Research, his wide-ranging commentaries have addressed monetary policy, the intersection of markets and politics, the role of government in the economy, fund flows and positioning in financial markets.

JIMMY C. CHANG, CFA
Chief Investment Officer, Rockefeller Global Family Office

Jimmy C. Chang, CFA, is the chief investment officer of the Rockefeller Global Family Office. He is a member of the firm's management committee and a Chartered Financial Analyst®. Chang has spent more than 16 years with Rockefeller.

Before becoming CIO in 2020, he was the chief investment strategist and a senior portfolio manager where he co-managed several equity strategies and oversaw the Fixed Income group. Before joining Rockefeller in 2004, Chang was a senior vice president, chief technology strategist and senior technology analyst at the U.S. Trust Company of New York, where he led technology equity research and co-managed a technology fund. He previously served as a senior marketing representative and advisory systems engineer at International Business Machines (IBM) from 1985–94.

He earned his MBA in Finance and International Business from New York University and a BS in Electrical Engineering from The Cooper Union.

KEYNOTE SPEAKERS *(cont.)*

AROOP CHATTERJEE
Global Macro Strategist, Foreign Exchange and Emerging Markets, MD, Wells Fargo

Aroop Chatterjee is a global macro strategist with more than 15 years of experience covering foreign exchange and emerging markets. Prior to joining Wells Fargo, he was managing director and head of FX & EM Macro Strategy, Americas for Barclays in New York. He was responsible for developing the bank's outlook and recommendations across EM, FX and local rates markets, determining the view on the USD and CAD, and contributing to the broader view on global FX.

Over the course of his tenure at Barclays, Chatterjee helped develop various frameworks for analyzing FX markets, trading models/systematic strategies and hedging frameworks. He holds a BS in Materials Science & Engineering and Economics from Northwestern University and an MBA from the University of Chicago's Booth School of Business.

CELIA DALLAS
Chief Investment Strategist, Cambridge Associates

As chief investment strategist for Cambridge Associates, Celia Dallas is responsible for formulating its global investment strategy. Since joining Cambridge Associates in 1996, Dallas has contributed to research initiatives and publications covering a wide range of capital market and investment planning topics, including portfolio construction, endowment spending, liquidity management and tactical asset allocation. She is the author of its quarterly publication, VantagePoint, in which she shares its house view and advice. She is a frequent presenter and discussion moderator at the firm's roundtables and industry conferences.

Before joining Cambridge Associates, Dallas was a consultant for Harlan Brown & Co, a competitive intelligence consulting firm. In this position, she researched, wrote and presented market analysis commissioned by Fortune 500 clients on a variety of consumer and industrial products. She also worked for the Employee Benefit Research Institute (EBRI), where she conducted research on retirement income security issues.

She has an MBA from the Darden School of Business at the University of Virginia and a BA from the University of Pennsylvania. She is a board member at Virginia Environmental Endowment.

ANUPAM DAMANI
Head of International & Emerging Markets Debt Strategy; Co-Head of Global Fixed Income Portfolio Management, Nuveen, A TIAA Company

Anupam Damani is a portfolio manager for Nuveen's global fixed income team and serves as the sector lead for sovereign credit, global rates and foreign currency. She is the co-head of global fixed income portfolio management as well as a portfolio manager for Nuveen's suite of emerging markets debt strategies and the international bond strategy. Damani is also a member of the Fixed Income Investment Committee, which discusses and debates investment policy for all global fixed income products.

Previously, Damani was the sovereign research analyst for the central and Eastern Europe, Middle East and Africa regions, lead emerging markets debt trader and portfolio manager for eurozone debt. Before joining the firm in 2005, she was an EMD portfolio manager and trader at Citigroup. Damani was ranked as one of the Top 20 Female Portfolio Managers in the United States by Citywire Professional Buyer magazine in 2018 and 2019.

Damani graduated with a BA in Political Science and Economics from Calcutta University in India and an MBA in Financial and Investment Management from Pace University, New York. She holds the CFA® designation.

DAVID DUONG, CFA
Head of Institutional Research, Coinbase

David Duong currently leads the cryptocurrency research effort for Coinbase Institutional, creating educational materials and market intelligence for the asset management community. His work focuses on market views, macro trends, tokenomics and systematic trading strategies. He was previously the head of Latin America FX research at HSBC, managing coverage on emerging markets, and spent over 17 years working in rates, macroeconomics and quantitative modeling.

David has a BA in Computer Science and Political Science from Colgate University and an MSc from the London School of Economics. He is also a CFA® charterholder.

LISA EMSBO-MATTINGLY, CBE
Managing Director of Research, Fidelity Investments

Lisa Emsbo-Mattingly is a managing director of research in the Asset Allocation Research Team (AART) at Fidelity Investments. In this role, Emsbo-Mattingly is responsible for conducting economic, fundamental and quantitative research to develop asset allocation and macro investment recommendations for Fidelity's portfolio managers and investment teams. AART is responsible for combining empirical research with foundational principles to execute a comprehensive, global and forward-looking approach to asset allocation across temporal segments of the economy and asset markets.

Prior to assuming her current position, Emsbo-Mattingly was head of economic research. In this capacity, she built a winning track record of combining economic insight with investment recommendations. Before joining Fidelity in 1996, Emsbo-Mattingly was an economic analyst at Eastern Research Group and an economic analyst in the international forecasting division at DRI/McGraw-Hill (now IHS Global Insight).

Emsbo-Mattingly earned her Bachelor of Arts in Economics and Government from Oberlin College and her Master's in Economics from Boston University. She is the former president of the National Association for Business Economics and of the Boston Economic Club. She is currently the head of the Conference of Business Economists.

MICHAEL GAPEN
Managing Director, Head of U.S. Economics, BofA Global Research

Michael Gapen is a managing director and head of U.S. Economics at BofA Global Research. Based in New York, he is responsible for the firm's outlook for the U.S. economy and, in particular, U.S. monetary policy, the impact of financial markets on the economy and consumer spending behavior.

Gapen joined Bank of America in 2022 from Barclays, where he was head of U.S. Economics Research and, following his appointment as Asset Allocation Strategist in January 2012, took on additional responsibility for forming the firm's asset allocation views and marketing them to clients.

Gapen joined Barclays from the Board of Governors of the Federal Reserve, where he was a section chief responsible for monetary and financial market analysis. He assisted the Board and the FOMC in the formulation of monetary policy and the Federal Reserve's response to the financial crisis. Prior to that, he served as an economist with the International Monetary Fund.

Gapen holds a PhD in Economics from the Department of Economics at Indiana University. He has taught finance and economics at the Kelley School of Business and Department of Economics at Indiana University, Mendoza College of Business at the University of Notre Dame and the Department of Economics at Johns Hopkins University. He has also guest lectured at the School of International and Public Affairs at Columbia University. He is a frequent commentator on news media outlets, including Bloomberg TV, CNBC and TV Tokyo, and is often cited in print and online media.

STACEY GILBERT
Chief Investment Officer, Portfolio Manager, Glenmede Investment Management

Stacey Gilbert is the chief investment officer of Glenmede Investment Management LP and co-portfolio manager of Derivatives. Gilbert oversees portfolio management, research and trading operations. She also shapes investment strategy and implementation.

Prior to joining Glenmede, Gilbert served as the head of derivative strategy at Susquehanna Financial Group. In this role, she led a team responsible for providing market commentary, actionable ideas, and trading strategies driven by catalyst events, breaking news and sector analysis. During her more than two decades at Susquehanna, she held several leadership positions including key senior positions on the trading desk and the American Stock Exchange. Gilbert also led the company's Education department.

Gilbert earned a Bachelor of Arts in Mathematics with a minor in economics from Dartmouth College.

KEYNOTE SPEAKERS (cont.)

DAVID GIROUX, CFA
Chief Investment Officer,
Head of Investment Strategy,
Portfolio Manager,
T. Rowe Price

David Giroux, CFA, is a portfolio manager in the U.S. Equity Division of T. Rowe Price Investment Management (TRPIM). He manages the Capital Appreciation Strategy, including the T. Rowe Price Capital Appreciation Fund. He serves as chief investment officer and head of investment strategy and is a member of both the TRPIM Investment Steering and ESG committees.

Giroux is a five-time nominee and two-time winner of Morningstar's Fund Manager of the Year award in the allocation category. Of Giroux, Morningstar said, "This portfolio manager belongs on the Mount Rushmore of the greatest investors of this decade." The Capital Appreciation Fund has won 17 Best awards from Lipper since he became its portfolio manager in 2006 and it ranks in the top percentile of Lipper's Mixed-Asset Target Allocation Growth classification for the 15 years ending Sept. 30, 2022.

Giroux is the author of "Capital Allocation: Principles, Strategies, and Processes for Creating Long-Term Shareholder Value" (McGraw Hill, 2021). Giroux joined T. Rowe Price in 1998 as an associate analyst. Two years later, he became an analyst of the industrials, machinery, building products and automotive sectors.

He holds a Bachelor of Arts, magna cum laude, in Finance and Political Economy from Hillsdale College as well as the Chartered Financial Analyst® designation.

LARRY HAMDAN
Head of Mergers &
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 at Credit Suisse.

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.

JEANINE HIGHTOWER-SELLITTO
Chief Strategy Officer,
EDX Markets

Jeanine Hightower-Sellitto is the chief strategy officer of EDX Markets. In this role, she is responsible for the launch and growth of the EDX digital asset exchange. Prior to EDX, Hightower-Sellitto was the CEO of Atomyze LLC, a global fintech company that developed a tokenization platform and marketplace to digitize and modernize the sourcing, investing and trading of commodities.

From 2018–20, Hightower-Sellitto served as the managing director of operations at Gemini Trust Company, LLC, a chartered NY State Trust Company that operates a digital asset exchange and offers custodian services. In the 13 years prior, Hightower-Sellitto held several leadership roles, including chief operating officer, at the International Securities Exchange (ISE), a NASDAQ subsidiary that operates three securities exchanges. Hightower-Sellitto started her career in 1998 as a financial analyst in the Technology Investment Banking group of Wachovia Securities.

Currently, Hightower-Sellitto serves on the board of Digital Prime Technologies, which offers a full suite of turnkey prime services for traditional firms entering the digital asset space. She is a graduate of The University of North Carolina at Chapel Hill with degrees in economics and biology.

BILL IRVING
CIO, Global Asset Allocation, Fidelity Investments

Bill Irving is chief investment officer of the Global Asset Allocation (GAA) group at Fidelity Investments. GAA is an investment team within Fidelity's Asset Management Solutions division, an integrated investment, distribution and client service organization.

In this role, Irving oversees the portfolio management and trading/portfolio analysis of the Target Date, Retail Solutions and Canadian Multi-Asset Solution strategies. Additionally, he is responsible for working to develop and grow multi-asset capabilities and investment products.

Previously, Irving was a managing director of research in the GAA division, overseeing the GAA Quantitative Research, Manager Research and Portfolio Analysis teams. He also had oversight of Fidelity's Counterparty Research team.

Irving earned his Bachelor of Science, Master of Science and Doctorate in Electrical Engineering from the Massachusetts Institute of Technology (MIT).

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. Recently, 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.

EVAN KATZ
Managing Director, Crawford Ventures, Inc.

Evan Katz is managing director of Crawford Ventures, Inc., a leading Manhattan-based alternative asset investment firm that forms, grows, holds interests in and raises very substantial investor capital for compelling hedge funds, private equity funds and other alternative investment funds. Katz was voted and nominated by the hedge fund industry as its best fundraiser in both the 2021 and 2022 Hedgeweek awards.

An honors graduate of The Wharton School of Business and Harvard Law School, Katz has worked on Wall Street since 2003 and is highly regarded as an expert on alternative asset best practices, institutional investors, family offices and successful large-scale fundraising. In this regard, he has raised substantial investor capital and commitments for compelling hedge funds, private equity funds and early-stage technology and medical life sciences companies.

Katz was twice-elected as director of the Hedge Fund Association Board of Directors, on which he served from 2014–19. Prior, he served on the HFA Advisory Board for two years from 2012–14 and was honored to receive the "Young Leadership Award" at the 2011 Hedge Fund Summit. Over the course of his career on Wall Street, Katz has been quoted numerous times in the hedge fund and finance press. Likewise, Katz is a frequent featured speaker and panelist at leading hedge fund conferences, symposia and webinars as an expert regarding alternative investments, institutional and family office investors, successful large-scale fundraising, the state of the hedge fund industry and hedge fund best practices. In addition, Katz is actively involved with and supports numerous hedge fund, Wall Street and other philanthropic causes including Hedge Funds Care / Help For Children ("HFC"), on whose "Committee of Hearts" he has been an active member since 2016.

Katz lives in New York City with his wife Ruth, an executive director at Morgan Stanley, and their daughter.

KEYNOTE SPEAKERS *(cont.)*

TOM KEENE, CFA
Co-Anchor, Bloomberg Surveillance: TV then Radio

Tom Keene is editor-at-large for Bloomberg Television and Radio. He provides economic and investment perspective to Bloomberg's various news divisions. He created the chart of the day article and the Bloomberg on the Economy radio show. He is host of Bloomberg Surveillance seen at 5–7 a.m. ET weekdays on Bloomberg Television and then 7–10 a.m. on Bloomberg Radio, worldwide. Tom is editor of "Flying on One Engine: The Bloomberg Book of Master Market Economists, Fourteen Views on the World Economy," published in 2005 (two chapters appeared in the CFA Institute curriculum). He is a graduate of the Rochester Institute of Technology and was enrolled in courses at the London School of Economics External Programme. He is a Chartered Financial Analyst® and a member of the CFA Institute, the Council on Foreign Relations 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 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 Asset Management, he served as an 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 has an MA and PhD in Economics from Michigan State University and a BA in Economics from University College Dublin in Ireland.

JESSICA LONG
Real Estate Trade Association

Jessica Long has just begun a new position at Real Estate Trade Association. Prior to that, Long was the head of sustainability for Nuveen's U.S. real estate portfolio. She is responsible for the implementation of the firm's "tomorrow's world" sustainability platform, focusing on climate risk and meeting carbon reduction targets. She manages a team of internal sustainability professionals as well as external consultants that engage at the asset level to achieve the firm's sustainability goals.

Prior to joining the firm, Long led the sustainability program for JBG SMITH, a real estate investment trust focused on investment and redevelopment of real estate in the Washington, D.C., metro region.

Long is an active member of the sustainability community locally and nationally. She served as a co-chair of the host committee for USGBC's Greenbuild Conference in 2015. In 2016, she was named Member of the Year for USGBC National Capital Region; in 2018 she was named Member of the Year for the NAIOP DC-MD chapter.

Long graduated with a BA in Business Administration and Communications, with a minor in economics, from McDaniel College. She holds LEED AP and EBOM and WELL AP accreditation as well as the Fundamentals of Sustainability Accounting credential.

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, 8 professional schools, a College of Arts and Sciences, and 21 Division I athletic teams. 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. Among its distinctions is the Quinnipiac University Poll, deep and broad excellence across the health sciences, and graduates who achieve among the best employment outcomes in the country.

Before joining Quinnipiac University, she 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, the accrediting and thought leadership body for global business schools.

Among her other roles, Olian served or serves on 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, L.P. 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 the book "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). Page earned his MS in Finance and his bachelor's in business administration from Sherbrooke University in Sherbrooke, Quebec, Canada.

DANA M. PETERSON
Chief Economist and Leader of the Economy, Strategy and Finance Center, The Conference Board

Dana M. Peterson is the chief economist and leader of the Economy, Strategy and Finance Center at The Conference Board. Prior to this, she served as a North America economist and later as a global economist at Citi, the world's largest investment bank. Her wealth of experience extends to the public sector, having also worked at the Federal Reserve Board in Washington, D.C.

Peterson's wide-ranging economics portfolio includes analyzing global themes having direct financial market implications, including monetary policy, inflation, labor markets, fiscal and trade policy, debt, taxation, ESG, consumption and demographics. Her work also examines myriad U.S. themes leveraging granular data.

Peterson's research has been featured by U.S. and international news outlets, both in print and broadcast. Publications and networks include CNBC, FOX Business, Bloomberg, Thomson Reuters, CNN Finance, Yahoo Finance, TD Ameritrade, Barron's, the Financial Times and the Wall Street Journal. She is a member of the Board of Directors of NBER, NABE and the Global Interdependence Center; the 1st Vice Chair of the New York Association for Business Economics (NYABE), and a member of NBEIC, the Forecasters Club and the Council on Foreign Relations.

She received an undergraduate degree in economics from Wesleyan University and a Master of Science in Economics from the University of Wisconsin–Madison.

KEYNOTE SPEAKERS *(cont.)*

HOLLY J. RAIDER, PHD
Dean, Quinnipiac University School of Business

Holly J. Raider has more than 20 years of experience developing and leading global business education, and spearheading strategic learning partnerships with corporations, government, healthcare systems, professional sports organizations and international universities. From 2006–11, she worked in executive education at the University of Chicago's Booth School of Business, where she oversaw its strategic business leadership program, and designed and taught in global learning initiatives for senior executives and Executive MBA students.

Raider joined the Kellogg School of Management at Northwestern University as a clinical professor of management in 2011. She served as associate dean of academic and faculty initiatives from 2016–18 and as managing director of executive education from 2014–21. In these roles, she led the implementation of Kellogg's first fully online, non-degree approach to graduate business education, designed and spearheaded Kellogg's Advanced Management Program, and developed SPARK, an innovative teaching incubator.

Raider earned her BA from Barnard College and her PhD in Sociology from Columbia University. She was named dean of the School of Business at Quinnipiac in 2021.

ANTHONY SCARAMUCCI
Founder and Managing Partner, SkyBridge
Founder & Chairman, SALT

Anthony Scaramucci is the founder and managing partner of SkyBridge, a global alternative investment firm, and founder and chairman of SALT, a global thought leadership forum and venture studio.

Prior to founding SkyBridge in 2005, Scaramucci co-founded the investment partnership Oscar Capital Management, which was sold to Neuberger Berman in 2001. Earlier, he worked in private wealth management at Goldman Sachs & Co.

In 2022, Scaramucci was ranked No. 47 in Cointelegraph's Top 100 Influencers in Crypto and Blockchain. In 2016, he was ranked No. 85 in Worth Magazine's Power 100: The 100 Most Powerful People in Global Finance. In 2011, he received Ernst & Young's New York Financial Services "Entrepreneur Of The Year" Award. Scaramucci is a member of the Council on Foreign Relations (CFR) and a board member of the Federal Enforcement Homeland Security Foundation. He is the author of five books.

Scaramucci served on President Donald J. Trump's 16-person Presidential Transition Team Executive Committee, and in 2017, briefly served as Chief Strategy Officer of the Export-Import (EXIM) Bank and White House Communications Director.

Scaramucci, a native of Long Island, New York, holds a Bachelor of Arts in Economics from Tufts University and a Juris Doctor from Harvard Law School.

PETER SPIEGEL
U.S. Managing Editor, The Financial Times

Peter Spiegel is the U.S. managing editor for The Financial Times, managing the U.S. bureau network, taking the lead on stories and deploying newsroom resources to expand the American subscriber base. Based in London, Spiegel has been FT News Editor for the past three years, during which he successfully transformed the FT's publishing schedule and helped embed a culture of innovation across the newsroom. He was key to The Financial Times being named Newspaper of the Year at the 2018 British Press Awards. He previously spent six years in Brussels as the FT's bureau chief, leading coverage of the European economic crisis and Europe's role in global affairs. In 2012 and 2013, Spiegel and his team won back-to-back Society of American Business Editors and Writers awards for their coverage of the eurozone debt crisis. Earlier in his career, he worked at The Wall Street Journal, The Los Angeles Times and Forbes.

JURRIEN TIMMER
Director of Global Macro, Fidelity Investments

Jurrien Timmer, CMT, is the Director of Global Macro 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. Timmer is part of Fidelity's Global Asset Allocation group, where he specializes in asset allocation and global macro strategy. Timmer has been at Fidelity for 28 years and has close to four decades of experience in the industry. He appears frequently in the media and can be seen on CNBC, Bloomberg and Fox Business. He is also on social media via Twitter and LinkedIn.

Prior to assuming his current position in 2005, Timmer held various other roles within Fidelity, including director of market research and technical research analyst. He also co-managed Fidelity Global Strategies Fund from 2007–14. Before joining Fidelity in 1995, Timmer was a vice president in the Fixed Income group at ABN AMRO Bank in New York. He has been in the investments industry since 1985.

Timmer earned his Bachelor of Science in Finance from Babson College. He was born and raised a Dutch citizen in Aruba, but has been living in the United States all of his adult life. He became a U.S. citizen in 2002. Timmer is a strong proponent of healthy work-life integration and is an avid cook and cyclist.

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 B.Sc. with first-class honors in Economics and Politics from the University of Bath in Bath, England, and an M.Sc. in Economics from the London School of Economics and Political Science.

DARREN WOLF, CFA
Senior Investment Manager and Global Head of Investments – AIS, abrdn

Darren Wolf is a senior investment manager and is the global head of investments, alternative investment strategies at Aberdeen Standard Investments. As such, Wolf is responsible for working with and managing the investment team, which oversees hedge fund manager research, portfolio construction and top-down strategy research. Wolf joined Aberdeen Asset Management via the acquisition of Arden Asset Management LLC in 2015 where he was the director of research and a member of Arden's Investment Committee. At Arden, Wolf was responsible for managing the day-to-day research activities of the firm. Previously, he was on the Investment Committee and the head of research at Robeco-Sage Investment Management, where he joined as a member of the investment team in 2001.

LOWELL YURA
Head of Multi-Asset Solutions – North America, T. Rowe Price

Lowell Yura is the head of multi-asset solutions for North America within the Multi-Asset Division of T. Rowe Price. Yura and his team engage North American clients and prospects in consultative discussions to identify how T. Rowe Price can best meet their investment needs and objectives through the firm's broad equity, fixed income and asset allocation investment capabilities.

Prior to joining T. Rowe Price in 2017, Yura served as managing director and head of multi-asset solutions for BMO Global Asset Management in Chicago. Before BMO, Yura was managing director and head strategist of the Americas and U.K. for global investment solutions at UBS Global Asset Management. Earlier in his career, Yura was a consulting actuary at Towers Perrin and an investment consultant at Mercer.

Yura has extensive experience in the design and management of investment solutions across a range of markets. His background includes responsibility for global balanced, global tactical asset allocation, liquid alternative and overlay strategies for U.S. mutual funds and separate accounts.

Yura earned a BS in Actuarial Science from the University of Illinois at Urbana-Champaign and an MBA from the University of Chicago Booth School of Business. He also has earned the Chartered Financial Analyst® and Associate of the Society of Actuaries designations.

Quinnipiac University's GAME VIII Forum in Times Square.

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OVERSIGHT CHAIR LETTER

It's an honor and a privilege to welcome you to GAME Forum XII. Serving in the role of Oversight Chair, I've spent the past eight months leading a team of 45 students all driven by the same purpose: to continue to make GAME the premier destination for future leaders of the financial services industry.

But truth be told, today was four years in the making for me. I attended the 2019 GAME Forum as a high school senior and admitted student — right then I knew that a Quinnipiac School of Business education would enable me to pursue my passion. I came away so impressed by what a professional environment the QU students had cultivated. Now that we're back in New York City and finally able to hold an in-person conference again, I'm excited for you to experience it. The atmosphere is truly electric.

With all the planning and coordinating behind us, now the fun part begins. We've invited students from universities around the world to participate in panels and workshops hosted by industry icons. I urge you to get involved, to start building the professional network that will shape the next chapter of your career. And as you absorb all the sharp insights that will steer the direction of the global investment environment for the foreseeable future, don't forget to enjoy the present. You've earned it. We all have.

Sincerely,

Dylan T. Jones '22, MBA '23

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