

Tuesday, August 22, 2017

- 12:00 –** Registration - Knight Hall, Frick Forum
1:00 pm
- 1:00 –**
1:15 pm Welcome & Opening Remarks Richard Ryffel, Senior Lecturer in Finance, Washington University
- 1:15 –**
2:00 pm Presenter - Bob Dannhauser, Head, Global Private Wealth Management, CFA Institute, "The Art and Science of Wealth Management: Looking to the Future"
- 2:00 –**
2:15 pm **BREAK**
- 2:15 –** Presenter - Dan Bergstresser, Associate Professor of Finance, Brandeis International Business School, "Changes in the Municipal Bond Landscape since the Global Financial Crisis"
3:00 pm
- Discussant - Linda Matkowski, Chief Operating Officer, Stern Brothers & Co.
3:00 – Presenter - Andy Kalotay, President, Andrew Kalotay Associates, "Tax Optimization of Municipal Bond Portfolios"
3:45 pm
- Discussant - Steve Wood, Principal, Stephen A. Wood Consulting, LLC
3:45 –
4:00 pm **BREAK**
- 4:00 –** "Remembering Steve Ross: The Man and His Ideas" - Phil Dybvig, Boatmen's Bancshares Professor of Banking and Finance, Washington University, Rick Antle, William S. Beinecke Professor of Accounting, Yale University, Michael Griswold, Senior Director, Risk Management and Asset Allocation, Ascension Investment Management
- 5:00 pm**
- Frick Forum - Knight Hall**
5:00 –
6:00 pm Cocktails & hors d'Oeuvres

Wednesday, August 23, 2017

- 7:00 –**
8:00 am Breakfast, Knight Hall, Frick Forum
- 8:00 –** A Discussion of the Importance of Financial Services to the Economy - William Cohan, Author, "Why Wall Street Matters"
9:00 am
- 9:00 –**
9:15 am **BREAK**
- 9:15 –** Presenter - Jerry Schlichter, Founding and Managing Partner, Schlichter, Bogard, & Denton, "Litigation Pitfalls for 401k Plan Fiduciaries"
10:00 am
- 10:00 –**
10:15 am **BREAK**
- Presenter - Matt Ringgenberg, Associate Professor of Finance, David Eccles School of Business, "On Index Investing"
10:15 –
11:00 am
- Discussant - Hans Fredrickson, CIO, Oak Summit Capital
Presenter - Todd Gormley, Associate Professor of Finance, Washington University, "Standing on the Shoulders of Giants: The Effect of Passive Investors on Activism"
11:00 –
11:45 am
- Discussant - Charles Stucke, Chief Executive Officer, Lepercq
11:45 –
12:00 pm **BREAK**
- 12:00 –** Presenter - Emily Gallagher, Postdoctoral Research Associate in Household Finance, Washington University,

12:45 pm "Financial Challenges of Low-Income Households"

Discussant - Chris Krehmeyer, President and CEO, Beyond Housing

**12:45 –
2:00 pm** **Box Lunch - Frick Forum**

2:00 – **FinTech Showcase** - Presenter - Cliff Holekamp, Senior Lecturer in Entrepreneurship, Academic Director for Entrepreneurship "How Venture Capital Pays"

2:30 pm **FinTech Showcase Panel** - Ben Harrison, Chief Revenue Officer and Co-founder, DealCloud, Inc., Josh Smith, Co-founder and CEO, Solovis, Laurence Stock, COO and Co-founder, Numerated Growth Technologies, Inc., "Automation in Asset Management"

**2:30 –
3:30 pm** Moderator - Joe Maxwell, Managing Partner, Cultivation FinTech

3:30 – **FinTech Showcase** - Keynote Address - Jim McKelvey, General Partner and Co-founder, Cultivation Capital, Co-founder and Director, Square

4:15 pm **4:15 –
5:00 pm** **Cocktails/Networking**