

Thursday, August 22, 2019

8:00 am - 8:45 am

Registration/ Breakfast/ Networking- Frick Forum, Knight Hall

8:45 am - 9:00 am

Dean's Welcome / Conference Kick-off

Wealth Management Leadership Panel

Panelists:

Stifel, CEO- Ron Kruszewski

9:00 am - 10:15 am

Wells Fargo Advisors, Senior Managing Director- John Alexander

Edward Jones, Managing Partner- Penny Pennington

TD Ameritrade, President, Retail- Peter deSilva

Moderator: J.P. Morgan Private Bank, Market Manager- Rich Ryffel

10:15 am - 10:30 am

BREAK

Passive Investing, Activism and Governance Panel

Panelists:

Olin Business School, Professor- Todd Gormley

10:30 am - 11:45 pm

Marathon Partners, Managing Partner- Mario Cibelli

BlackRock, Vice President- Jessica McDougall

Moderator: Wells Fargo Asset Management, Portfolio Analyst- Michael Alderson

11:45 pm - 12:45 pm

Lunch- Frick Forum, Knight Hall

The Role and Effectiveness of Private Equity in Portfolio Construction Panel

Panelists:

Harvard Business School, Professor- Erik Stafford

12:45 pm - 2:00 pm

Ascension Investments, Managing Director- Vince Stegman

Washington University Investment Management Company, Managing Director- Mike Stohler

Warburg Pincus, Director- Dr. Rudiger Stucke

Moderator: Private Value Investor- Charles Stucke

2:00 pm - 2:15 pm

BREAK

Trends in Environmental, Social and Governance Investing Panel

Panelists:

Breckinridge Capital Advisors, Senior Vice President- Tim Coffin

2:15 pm - 3:30 pm

Vert Asset Management, Co-Founder & CEO- Sam Adams

Highpoint Capital, Founder & CEO- Gautam Dhingra

Moderator: Sunpointe Investments, Managing Director- Jack Dwyer

3:30 pm - 3:45 pm

BREAK/ TRANSITION TO BREAKOUTS

Capital Introduction Sessions

Alpha Simplex: David Kuenzi "Dynamic Strategy Migration and the Evolution of Risk Premia" (Emerson Auditorium)

3:45 pm - 4:30 pm

Breckinridge Capital Advisors: Tim Coffin (Bauer Hall Rm 230)

Efficient Capital Management: Chad Martinson, "The Efficient Approach: Maximizing the Power of Diversification" (Bauer Hall Rm 240)

4:30 pm - 4:45 pm

BREAK / TRANSITION TO BREAKOUTS

4:45 pm - 5:30 pm

Capital Introduction Sessions

SummerHaven Investment Management: Erik Stafford, "Replicating Private Equity"

(Emerson Auditorium)
Marathon Partners (Bauer Hall Rm 230)
Off the Chain Capital: Brian Estes- "Blockchain & Digital Currency Investing" (Bauer Hall Rm 240)

5:30 pm - 6:30 pm
Friday, August 23, 2019

Cocktails & Networking - Frick Forum, Knight Hall

7:30 am – 8:30 am

Breakfast / Registration - Knight Hall, Frick Forum
Preparing the Private Wealth Manager of the Future

8:30 am – 9:15 am

Panelist: CFA Institute, Head of Global Private Wealth Management- Bob Dannhauser
Security Analysis: An Investment Perspective

9:15 am – 10:15 am

Researcher: Ohio State University, Professor- Lu Zhang
Discussant: Oak Summit Capital, CIO- Hans Fredrikson

10:15 am – 10:30 am

BREAK
Women in Investing

10:30 am – 11:30 am

Panelists:
Mercy, Deputy Chief Investment Officer- Elizabeth Jourdan
DSM Capital Partners, Portfolio Manager- Hannah Chiang
Edward Jones, Investment Strategist- Kate Warne

11:30 am – 12:15 pm

Moderator: J.P. Morgan, Executive Director & Client Advisor- Wendy Hershey
Climate Change and Asset Prices- A Review of the Literature
Discussant: Saint Louis University, Assistant Professor- Marcus Painter

12:15 pm – 1:00 pm

Lunch / Networking

1:00 pm – 1:45 pm

Fireside Chat with David Booth - Founder, Dimensional Fund Advisors
Interlocutor: Olin Business School, Dean- Mark Taylor

1:45 pm – 2:15 pm

Venture Capital Update - Nationally and in St. Louis

2:15 pm – 2:30 pm

Presenter: Cultivation Capital, Co-Founder & General Partner- Cliff Holekamp
BREAK

2:30 pm - 3:45 pm

Wealth & Health - How Data and Technology are Changing Advice Panel

Panelists:
RGAX, CEO- Dennis Barnes
Lapetus, Co-Founder & Chief Science Officer- Jay Olshansky
Synergy Wealth Solution, Financial Planner- Nick Dragan

3:45 pm - 4:00 pm

Moderator: SixThirty, Managing Partner- [Atul Kamra](#)

4:00 pm - 5:00 pm

Program Adjournment
Cocktails & Networking- Frick Forum, Knight Hall