Fed Signals Hold on Rate Increases
The Federal Reserve indicated in early February that it was done raising interest rates for now, fueling a market rally.

Women Claim New Turf on Wall Street
Women are fueling the growth of one of the most popular products on Wall Street; the $700 billion market for collateralized loan obligations, where one in four senior executives is female.

Market Conditions Unknown as Investors Sail On
Strong economic data is countering sentiment towards a slowing economy. Investors are tepidly moving forward as they feel out current conditions.

Apple Retail Chief to Depart
Angela Ahrendts is leaving the company in April after more than five years in the role. She will be succeeded by Vice President of People, Deirdre O’Brien.

Stocks Pushed Higher by Tariff Delay
U.S. stocks jumped Monday, following global indexes higher, after President Trump said he would delay a planned increase in tariffs on Chinese goods.

Source: The Wall Street Journal
Global Markets Outlook
9:00 - 10:30: Wells Fargo Auditorium

Value Investment Keynote
10:45 - 12:00: Wells Fargo Auditorium
Breakout Session 1
1:30 - 2:30

1A: Venture Capital: Tate 207

JOHN OSBORNE
Managing Partner, Good Growth Capital, Charleston, SC

AMY SALZHAUER
Managing Partner, Good Growth Capital, Charleston, SC

STEVE SWANSON
Former CEO / Founder of Automated Trading Desk, Charleston, SC

1B: Derivatives: Tate 202

MATT MORAN
Head of Global Benchmark Indexes Advancement, Cboe Global Markets, Chicago, IL

DR. D. SYKES WILFORD
W. Frank Hipp Distinguished Professor in Business Administration, The Citadel: The Military College of South Carolina, Charleston, SC

1C: Impact Investing: Beatty 212

JASON BRITTON
Founder and Managing Partner, Reflection Companies, Charleston, SC

LYLE CASRIEL
Senior Vice President — Investments, UBS Private Wealth Management, New York, NY

CHRIS MATTEINI
Analyst, TIFF Investment Management, Boston, MA
Breakout Session 2
2:45 - 3:45

2A: Private Equity: Tate 207

CHRISTIAN H.M. ALBERT
Managing Partner, Bowside Capital, Charleston, SC

WILL DUBÉ
Research Analyst, Frontier Capital, Charlotte, NC

WALT GREEN (Moderator)
Private Investor; Advisory Board Member, School of Business Investment Program, Charleston, SC

ELIZABETH HAMMOND
Director, Kohlberg Kravis Roberts & Co, New York, NY

2B: Technical Trading: Tate 202

JIM CARROLL
Managing Partner, LongRun Capital Management LLC, New York, NY

TOM DORSEY
President of Dorsey Holdings and Founder of Dorsey, Wright & Associates, Richmond, VA

J. TIM SNAVELY
Portfolio Manager, Crawford Investment Counsel, Atlanta, GA

2C: ETFs: Beatty 212

DUSTIN BARR, CFA
Consultant and Director of Research, Carolinas Investment Consulting, Charlotte, NC

JOANNE HILL
Chief Advisor for Research and Strategy, CboeVest, McLean, VA

JAMES SEYFFART
ETF & Commodities Analyst Bloomberg Intelligence, Bloomberg, Princeton, NJ
Breakout Session 3
4:00 - 5:00

3A: Real Estate: Tate 207
THOMAS CARROLL
Partner, Ballast Rock Capital and Watermark Partners Real Estate

OLIVIA COCO
Associate, Goldman Sachs, Dallas, TX

ALBERTO DONOSO
Managing Director, Global Development, Greystar, Charleston, SC

GABE HENDERSON
(Moderator) Associate, Goldman Sachs, New York, NY

3B: Quant Investing: Tate 202
CHARLES CROW IV
Chief Data Scientist, Portfolio Manager, and Partner, Weiss Multi-Strategy Advisors, New York, NY

JOHN LEWIS
Visiting Assistant Professor, The Citadel: The Military College of South Carolina, Charleston, SC

MCLEAN WILSON
CEO, inFactor Corp, General Partner, Charleston Capital Management, Charleston, SC

3C: Fixed Income: Beatty 212
MARK BUONO
Managing Director — Investment Office, Global Atlantic Financial Group, New York City, NY

DEAN SMITH
Founder and Principal, Stonehenge Financial Partners, Charleston, SC

JOHN WISEMAN
Director of Fixed Income, Greenwood Capital, Greenwood, SC
Greystar Real Estate Partners, LLC, an integrated real estate company, provides management, development, and investment services for residential properties in the United States and internationally. It offers property management services that include national property management, due diligence services, financial services, construction management, master insurance programs, procurement, information technology, education and training, marketing and communications, and development and construction services for multifamily projects. Greystar Real Estate Partners LLC was founded in 1993 and is based in Charleston, South Carolina.

U.S. Trust specializes in the complex financial needs of wealthy individuals and families. For more than 200 years, our global perspective, breadth of capabilities, unique team approach, and fiduciary platform have differentiated us from other private banks and enabled us to help manage and preserve wealth across generations.

CFA Society of South Carolina promotes the highest ethical standards and professional excellence within the local investment community. CFA Society South Carolina is an association of local investment professionals, consisting of portfolio managers, security analysts, investment advisors, and other financial practitioners, that has served CFA charter holders and CFA program candidates locally for more than the last 15 years. CFA Society South Carolina has over 100 members and is a member society within CFA Institute. Our members are part of a global network of more than 130,000 finance and investment professionals in more than 150 countries and territories. Our goal is to make a difference in the future of the profession at the local level.

inFactor is an integrated financial technology company providing liquidity solutions across the spectrum of non-bank lending. Our core principle is that capital is most prudently valued as a function of scarcity plus risk, and that comprehensive risk management can lead to optimal transactions in any macro climate.

The Carter Real Estate Center (CREC) brings together students, faculty, and industry leaders (including an extensive alumni network) – through the synergy of teaching, research, and service – to better understand the complexities of the real estate asset and help find practical solutions for the issues facing the industry today.
FineMark National Bank & Trust is a nationally chartered bank & trust company founded in Fort Myers, Florida in 2007. FineMark offers a full range of financial services, including personal and business banking, lending services, and asset management and trust services through its offices located in Florida, Arizona and South Carolina. FineMark Sports Management®, a division of FineMark, manages the financial affairs of nearly 200 athletes and sports executives from the PGA, LPGA, MLB, WNBA, NFL, and NHL. FineMark Holdings, Inc. is the parent company of FineMark National Bank & Trust and is traded on the OTCQX under the symbol FNBT. FineMark is dedicated to providing a culture of service to our clients and making a positive difference in the communities we serve.

HDH Advisors is a full-service business valuation and consulting firm. Founded in 2007, HDH has offices in Atlanta, Georgia and Des Moines, Iowa. Core areas of practice include business valuation, litigation support, and turnaround and restructuring consulting. The firm strives to provide clients with personal and professional service based on a deep understanding of the issues they face. HDH advises companies, boards of directors, special committees, independent trustees, legal counsel, and other trusted advisors. A team of professionals draws upon years of experience in advising clients on complex financial matters. HDH’s reputation has been crafted from the quality of service and is the platform for continued growth.

Carolinias Investment Consulting is one of the South’s premier investment advisory and financial planning firms. Throughout our more than 15-year history we have navigated the complexities of modern finance, coordinating the affairs of individuals and families, corporations and business owners, foundations, and endowments. Our institutional resources and reach are realized through a team of experienced in-house experts who hand-craft solutions for each financial challenge. As an employee - owned boutique, we deliver personalized attention in a family-friendly environment that giant banks and Wall Street firms simply can’t match. As one of the largest firms of its kind in the Southeast, we have access to industry-leading research, tools, and investment opportunities. Because of our independence, we are free to pursue the best interests of our clients without the inherent conflicts found in well-known financial conglomerates that sell their own proprietary products. Our consultants enjoy decades-long multigenerational relationships with our clients. We work with successful entrepreneurs, accomplished professionals, and their families to establish and achieve financial and life goals. We partner in stewardship with charitable foundations and endowments to advance and cement each significant legacy. Carolinas Investment Consulting delivers comprehensive planning and investment management with extraordinary client service.

To understand Greenwood Capital, take a look back more than a half a century when textiles were king. Thousands of SC textile employee pensions were entrusted to our predecessors, and by serving them well, the Investment Division of a South Carolina textile mill became Greenwood Capital in 1983. The convictions of our firm come from a history of managing a multi-million-dollar portfolio and the retirement incomes of hard-working families through turbulent times. We’ve learned our lessons well. Our decidedly disciplined approach has served our clients through prudent growth with a watchful eye for downside risks. It’s also made us one of the largest independent investment firms in the Southeast. No doubt, our global expertise is firmly rooted in South Carolina humanity.
A message from the student event coordinator:

On behalf of everyone in the School of Business Investment Program, I would like to thank you for joining us this year. We created the Symposium to allow for a dynamic exchange of ideas related to various investment management strategies. It is meant to serve as a unique opportunity for the rapidly growing financial community in Charleston to network and interact with other professionals, as well as students and faculty/staff of the College of Charleston School of Business. It also sheds further light on the work being done by the Investment Program, which has expressed a mission to better prepare students for employment in the field of investments. Finally, it allows visitors to experience the beauty and opportunities of Charleston as a place to both live and work.

I would also like to give special thanks to Dr. Pyles and Dr. Huerta, whose leadership and hard work are what make this event actually happen. They encourage their students to push themselves and achieve aspirations higher than they may have expected. We students in the Investment Program often find ourselves in a pursuit to go above and beyond with the intention of making Dr. Pyles and Dr. Huerta proud. I could not ask for a more rewarding education and I’m incredibly excited to share the outcome of that pursuit in this event.

Thank you again,
Daniel P. Hassett

East Bay Financial Services engages with planning-focused advisory firms that want to excel at all aspects of their practice but are often spread too thin to do it all themselves. East Bay’s experienced and credentialed professionals act as a virtual CIO, so advisors can dedicate more time to serving their clients and growing their business. East Bay also supports advisors’ efforts in client acquisition, client retention, and practice efficiency through our subscription-based, flat-fee model. Be part of a growing community where advisors are encouraged to share ideas and best practices.

Excluding affiliated funds of funds, as of December 31, 2018, Hartford Funds Management Company, LLC and its wholly owned subsidiary, Lattice Strategies LLC, had approximately $104.8 billion in discretionary and non-discretionary assets under management. Our line-up includes more than 50 mutual funds in a variety of styles and asset classes and seven strategic beta ETFs and four active ETFs. That’s why our approach is something we call human-centric investing. Human-centric investing works to understand the relationships between investors, their money and their financial advisors...and then create the products and advisor tools designed to serve those investors and their mindsets. No matter the asset class or type of fund, Hartford Funds will always strive to meet or exceed traditional industry benchmarks, but through human-centric investing, we intend to also raise the bar on performance, and make it mean more than numbers alone.

The 2018 - 2019 Investment Society
Speakers
Biographies
PETER COSTA - Managing Partner, Costa Family Office, New York, NY
Peter P. Costa is a former Governor with the New York Stock Exchange, President of Empire Executions, Inc. (a boutique trading firm on the floor of the NYSE), a CNBC Market Analyst and head of the Costa Family Office. Costa is regular contributor on CNBC throughout the day with Kelly Evans, Bill Griffeth and Scott Wapner. Additionally, Peter provides valuable insight into volatility of the markets (both domestically and internationally) for CNN and BNN. A sought-after keynote speaker at numerous industry conferences and national business schools, Mr. Costa supports many philanthropic organizations, particularly St. Judes and The Robinhood Foundation. As head of the Costa Family Office, Mr. Costa is responsible for managing the wealth of the Costa family who acquired their wealth through their involvement with Horizon Kinetics LLC, which includes the flagship Kinetics Internet Fund since its inception. Mr. Costa began his career as a clerk on the floor of the New York Stock Exchange over 30 years ago. Holding senior trading positions at Lehman Brothers, Francis P. Maglio Inc., Bear Stearns and Eckhart & Company, Mr. Costa co-founded Empire Executions Inc. in 2008.

DAVID HAYTHE - Senior Advisor, Morgan Stanley, Charleston, SC
David Haythe is a senior advisor at Morgan Stanley. Mr. Haythe joined Morgan Stanley in New York in 1975 as part of the Institutional Equity Division and transferred to the firm’s London, England, office upon its inception in early 1979. More recently he headed Morgan Stanley’s Private Wealth Management business, EMEA. He has had a long and diversified career in International Finance. Mr. Haythe holds a BA degree from Middlebury College and a MSc degree from the London School of Economics and Political Science, London, England.

JOANNE HILL - Chief Advisor for Research and Strategy, CboeVest, McLean, VA
Dr. Joanne Hill has over 25 years of experience in research and strategy with an emphasis on indexes, options and quantitative investments. Prior to joining CboeVest, Dr. Hill worked with ProShares for eight years, as Head of Institutional Investment Strategy, focusing on ETF research and education, and spent 17 years at Goldman Sachs, where she was a Managing Director leading global equity index and derivatives research and advising institutional investors on strategies using index and risk management tools. A recognized leader in the financial industry, Dr. Hill is a recipient of the William F. Sharpe Indexing Lifetime Achievement Award and has published extensively on quantitative investment topics, index products, and derivatives. Dr. Hill is a co-author (along with Dave Nadig and Matt Hougan) of A Comprehensive Guide to Exchange-Traded Funds (ETFs) published by the CFA Institute Research Foundation. She heads the research committee for the "Q" Group and the CFA Institute Research Foundation where she is also a board member. She also serves on the editorial board of the Financial Analysts Journal and Journal of Index Investing. Money Management Executive named Dr. Hill one of the ten inaugural recipients of the Top Women in Asset Management Awards. She was a Founding Member and Co-President of Women in ETFs and currently serves on their board. She is a member of the Investment Committee of the Montgomery County Public School Defined Benefit and Defined Contribution pension plans. Prior to her career on Wall Street, Dr. Hill was on the faculty of the University of Massachusetts (Amherst) and she has a Ph.D. in Finance from Syracuse University.
Value Investment Keynote
10:45 - 12:00: Wells Fargo Auditorium

D. SCOTT PHILLIPS, JR. - Portfolio Manager and Head of Research, Templeton and Phillips Capital Mgmt., Chattanooga, TN
Scott Phillips is portfolio manager and head of research at Templeton and Phillips Capital Management, LLC. Prior to working with Templeton and Phillips Capital Management, LLC, Scott Phillips founded Cumberland Capital Corp, located in Chattanooga, TN. Founded in June 2004, Cumberland Capital provided equity research services to Green Cay Asset Management, a hedge fund management company located in Nassau, Bahamas. In this capacity with Cumberland Capital, Scott was the lead research analyst on the Siebels Hard Asset Fund a long/short equity fund managed by Green Cay Asset Management. In addition to consulting on this fund Scott also provided equity recommendations for the Green Cay Emerging Markets Fund. Prior to consulting Green Cay’s funds Scott was employed as a research analyst with Green Cay beginning in January of 2004. Before joining Green Cay, Scott was an equity research associate analyst with SunTrust Robinson Humphrey (including its predecessor companies) in Atlanta GA from January of 1999 to December of 2003. Scott co-authored with Lauren Templeton of the book “Investing the Templeton Way” released in 2008 by McGraw Hill. Scott is also the author of “Buying at the Point of Maximum Pessimism” a book on forward looking investment themes published by the FT Press in 2010. In addition to these books, Scott co-authored a revision of William Proctor’s 1983 biography of Sir John Templeton titled “The Templeton Touch” released in December 2012. Scott is a member of the John Templeton Foundation and a trustee with the Templeton Foundation Inc. Scott received his B.A. from the University of the South.

DAVID MARCUS - Co-Founder and CEO, Evermore Global Advisors, Summit, NJ
David E. Marcus is Co-Founder, Chief Executive Officer and Chief Investment Officer of Evermore Global Advisors, LLC. He co-founded the firm in 2009. David is portfolio manager of the Evermore Global Value Fund and its separate account portfolios. Beginning his career in 1988 at Mutual Series Fund, where he was mentored by renowned value investor Michael Price, David rose to manage the Mutual European Fund and co-manage the Mutual Shares and Mutual Discovery Funds, representing over $14 billion in assets. He also served as director of European investments for Franklin Mutual Advisers, LLC. In 2000, David founded Marcstone Capital Management, LP, a long-short Europe-focused equity manager, largely funded by Swedish financier Jan Stenbeck. After Mr. Stenbeck passed away in 2002, Mr. Marcus closed Marcstone, co-founded a family office for the Stenbeck family, and advised on the restructuring of a number of the public and private companies the family controlled. David later founded and served as Managing Partner of MarCap Investors LP, which was seeded by Dan Stern of Reservoir Capital. At MarCap, Mr. Marcus managed a European small cap special situations fund from 2004 to 2009. At MarCap, David took large positions in small- and mid-cap companies, and, in a number of situations, took board seats to help set strategy and guide restructuring efforts. David graduated from Northeastern University in 1988 with a B.S. in Business Administration and a concentration in Finance.
JOHN OSBORNE - Managing Partner, Good Growth Capital, Charleston, SC
Born and raised in Billings, Montana, John Osborne studied finance and economics while attending Charleston Southern University on a golf scholarship. After graduating cum laude with a BS in Finance in 2002, John spent a decade working various roles in the financial services industry. A 2008 graduate of Leadership Charleston, John continued his civic involvement and served as Chairman of the Charleston Young Professionals group and board member of the Charleston Metro Chamber of Commerce. John is a past chairman of the Roper Foundation Fellows Program, serves on the Board of Directors of The Education Foundation, and on the Board of the Charleston International Film Festival. John was selected in the 2013 class of the CRBJ’s 40 under 40 award, 2014 50 Most Progressive by CHARLIE magazine, and was honored with the 2013 visionary of the year award by Azalea Magazine for launching fundingcharleston.com and The Harbor Entrepreneur Center. John took over as EA of Charleston Angel Partners in 2016 and in 2017 became a Managing Partner of Good Growth Capital, a local venture capital firm focused on early stage technology companies.

AMY SALZHAUER MCMARLIN - Managing Partner, Good Growth Capital, Charleston, SC
Amy is a Founder and Managing Partner at Good Growth Capital, an early-stage venture fund based in Charleston, SC but investing across the country. Amy was previously the CEO of Ignition Ventures, where she and her team helped to transfer technologies ranging from chip-based fuel cells (Lilliputian Systems) and self-organizing networks (Ember Corporation) to black silicon (SiOnyx), selective brain cooling (Toev Medical), and the world's most accurate scale (Bioscale) out of academic research labs, creating companies worth over US $1 billion. Amy’s many recognitions include being selected by the World Economic Forum as one of its one hundred top “Global Leaders for Tomorrow,” being chosen multiple times as a top “40 Under 40” business leader, serving on multiple profit and non-profit boards, and being featured on the covers of several business magazines. Amy is a passionate behind-the-scenes advocate for the emancipation of human slaves and for trafficked minors in the US prison system, an inventor who holds several patents, and speaks and teaches internationally about entrepreneurship and leadership. Her previous experience includes writing about science, sports, and innovation for magazines like Newsweek, Science, Technology Review, and Harvard Business Review; researching radioactive mutant slime molds; stints as a management consultant and at the United Nations in Geneva; drumming for the U.S. National Dragonboat Team (winning a silver medal at the 2003 World Championships); and serving as the Assistant Director of a non-profit environmental organization in Washington D.C. Amy is married to sports medicine doctor and 10-time world champion paddler Andrew McMarlin, a former officer in the US Navy. She holds an MBA from MIT; an M.Phil in Plant Sciences from Cambridge University where she was a Herschel Smith Harvard Scholar; and an A.B. magna cum laude from Harvard University.

STEVE SWANSON - Former CEO / Founder of Automated Trading Desk, Charleston, SC
Steve Swanson co-founded Automated Trading Desk (ATD), a pioneer in high frequency trading, in 1989. In 2001, Swanson was named President and CEO where he was responsible for growing ATD to 7% of US daily equity trading volume. In 2007, ATD was sold to Citigroup for $680 million. At Citigroup, Swanson was global co-head of electronic trading for equities. Since leaving Citi/ATD in 2010, he has been involved with several startups in New York and South Carolina. He was the Inside Director of operations and strategy at SnapCap, an alternative small business loan originator which was sold to Lending Tree in 2017 for $23 million. He serves on the board of directors at the Bank of South Carolina (NASDAQ: BKSC) and the executive committee of Charleston Angel Partners. He also serves on the board of directors of Engineered Marine Coatings, MedTrust, and Indexic. He currently serves on the philanthropic boards of Trident United Way, YesCarolina, and serval advisory boards at his alma mater, the College of Charleston. From 2015 to 2018, he was a member of the Board of Trustees at South Carolina State University tasked with turning around the ailing HBCU. That board successfully balanced the budget, increased admissions, and reaffirmed its SAC COC accreditation. In 2018, he was elected to join the Board of Trustees for the College of Charleston.
Derivatives
1:30 - 2:30: Tate 202

D. SYKES WILFORD - W. Frank Hipp Distinguished Professor in Business Administration, The Citadel: The Military College of South Carolina, Charleston, SC
With a primary interest in financial economics and global economic trends, Dr. D. Sykes Wilford his academic focus is diverse, ranging from specific asset allocation and hedge fund risk management techniques, to longer-term economic and global financial market trends. Over the past few years, he has been active in consulting for hedge funds, foundations, corporations and banks, as well as, multi-lateral organizations. Earlier in his career, Mr. Wilford held positions with the Federal Reserve Bank of New York, Drexel in London, and enjoyed an extensive career with Chase Manhattan Bank. While at Chase, he led efforts in numerous areas including interest rate and foreign exchange activities, along with trading and derivatives. Some notable activities include developing and leading the banks Advanced Financial Risk Analysis (AFRA) program in London and New York and founding and managing the Portfolios Strategies Group in London, the latter of which created the market’s first portfolio swap. Following his career at Chase, Sykes focused more on asset management in his role as Chief Investment Officer of Bankers Trust Private Bank and later CDC Investment Management, a hedge fund. Mr. Wilford is currently a Senior Advisor to Access Corporate Finance, London. Mr. Wilford has written extensively in both the academic and professional press. His articles have appeared in research journals such as the American Economic Review, the Journal of Applied Finance, The Review of Financial Economics and the Journal of Finance. He has authored, co-authored and edited five books, ranging from economic policy in developing countries to Managing Financial Risk. Mr. Wilford completed his Ph.D. in Economics from Tulane University in 1976.

MATT MORAN - Head of Global Benchmark Indexes Advancement, Cboe Global Markets, Chicago, IL
Matt Moran is vice president of business development for Chicago Board Options Exchange (CBOE), where he communicates with pension funds, mutual funds, and financial advisors. He has delivered more than 200 presentations worldwide on the topics of managing volatility and adding income with option-writing strategies. Previously, he served trust counsel at Harris Bank and vice president at Chicago Mercantile Exchange. He is an associate editor of two Institutional Investor publications — The Journal of Trading and The Journal of Index Investing. Mr. Moran holds JD and MBA degrees from the University of Illinois.
Impact Investing
1:30 - 2:30: Beatty 212

JASON BRITTON - Founder and Managing Partner, Reflection Companies, Charleston, SC
Jason Britton is the founder and managing partner of Reflection Analytics, a technology company delivering ESG investment evaluation, reporting and advisory services to platforms, institutions and high-net-worth individuals. Mr. Britton also serves as founder and CIO of Reflection Asset Management, a registered investment advisory firm specializing in the integration of ESG principles across asset classes and the creation and distribution of top decile performing investment products across multiple themes. Jason currently has four patents/trademarks for his work in ESG investing. Prior to founding the Reflection family of companies, Mr. Briton served as Chief Investment Officer of Work Capital and Good Asset Management, as well as the Senior Managing Director and Head Portfolio Manager for the US Trust Bank of America Social Innovation suite of products. Prior firms include: Barclays, Lehman Brothers and Keefe Bruyette and Woods. During his multi-decade career Mr. Britton has advised on over $3 billion in assets in the ESG field across the equity, fixed-income and alternatives asset classes. He is a prolific author of thought-leadership pieces in the ESG field and was formerly the head of the investment committee of the Hitachi Foundation of America. Additionally, Jason has served as guest faculty at Harvard University, Yale University, the Massachusetts Institute of Technology, The Wharton School at the University of Pennsylvania, UCLA and the College of Charleston. He is a graduate of the McDonough School of Business at Georgetown University and received his MBS from the Yale School of Management. Jason resides in Isle of Palms with wife, son and two golden doodles.

CHRIS MATTEINI - Analyst, TIFF Investment Management, Boston, MA
Chris Matteini joined TIFF in 2014. He performs investment research and selects and monitors external investment managers, focusing on marketable equity-oriented assets across TIFF’s comprehensive portfolios. Previously, Mr. Matteini conducted manager-related research and portfolio construction at the investment consulting firm NEPC and served as a senior alternatives investment analyst at Alcatel-Lucent's pension fund. He holds an AB in psychology from Harvard College.

LYLE CASRIEL - Senior Vice President - Investments, UBS Private Wealth Management, New York, NY
Lyle Casriel joined UBS Private Wealth Management in 2008 and has more than 13 years of experience in the financial services industry. Prior to joining UBS, he worked at Lehman Brothers where he co-founded the Community Investing Index Group to help commercialize a suite of innovative mission-oriented investment products. As a Private Wealth Advisor at UBS, Lyle manages over $3 billion in assets for high net worth clients, and concentrates on providing clients with holistic advice, around estate planning, liquidity management, asset allocation, portfolio construction, manager selection, impact investing, and philanthropy. Lyle received a bachelor’s degree from Washington University in St. Louis and an M.B.A. from the Marshall School of Business at the University of Southern California. Outside the office, Lyle has a passion for sustainability and social and green entrepreneurship and currently serves as an advisor to the Bard College M.B.A. in Sustainability program. He lives in New York City with his wife, Jennifer, and their two children.
CHRISTIAN H.M. ALBERT - Managing Partner, Bowside Capital, Charleston, SC

Christian Albert is the founder and managing partner of Bowside Capital, a private investment firm that specializes in the private equity, small buyout market. Bowside Capital manages private equity funds formed to invest in primary commitments to U.S. private equity funds with capital commitments of $150 million or less that make control buyouts, direct investments by co-investing with these small funds and independent sponsors, and secondary purchases of limited partner interests in funds that meet the primary commitment target criteria of size and strategy.

ELIZABETH HAMMOND - Director, Kohlberg Kravis Roberts & Co, New York, NY

Elizabeth Hammond joined KKR’s Client and Partner Group in 2009. Prior to joining KKR, she was a director at Citi Alternative Investments where she was involved in consultant relations and had responsibility for managing the RFP team. Ms. Hammond has 20 years of experience working in asset management sales and marketing. Her prior experience includes Siguler Guff, Deutsche Asset Management, and Lynch & Mayer. She holds a B.S. from the College of Charleston and an M.B.A. from Fordham University.

WILL DUBÉ - Research Analyst, Frontier Capital, Charlotte NC

Will Dubé joined the Frontier team in 2017 and is responsible for researching and screening relevant sectors to find potential investments that meet the firm’s criteria. Frontier Capital is a Charlotte-based growth equity fund focused exclusively on software and technology-enabled business service companies. Will enjoys discovering fresh opportunities in the market, collaborating with the business development and investment teams, and learning from others. Prior to joining Frontier, Will was a student at the College of Charleston and held internship-level positions at a commercial real estate firm and a startup incubator. A Michigan native, Will is a proud Detroit sports fan and enjoys staying active, whether he’s playing basketball, tennis, or golf.

WALT GREEN (Moderator) - Private Investor; Advisory Board Member, School of Business Investment Program, Charleston, SC

Walter Green recently retired from JPMorgan Chase. During his 45 year commercial, investment and private banking career he held multiple positions including Head of Strategic Planning & Marketing and Head of the Petroleum and Mining Division in the Commercial Bank, Head of the Financial Sponsor Group in the Investment Bank and Head of the Private Equity team in the Private Bank. For the last 20 years he primarily focused on working with private equity firms (M&A financing) and their Partners (personal wealth management). Mr. Green received his BBA and MBA from the Terry College of Business at the University of Georgia. He has served on Georgia’s Alumni Association Board and was a Founding Board Member for Terry’s Student Managed Investment Fund where he continues to serve as an Emeritus Member. He was recently named to the Board of Visitors for the University of Georgia Libraries. In Chicago, Mr. Green was active in the business community including serving on the Board of the Illinois Venture Capital Association (IVCA) and the Board of the Network for Teaching Entrepreneurship (NFTE). IVCA is the primary association for private equity and venture capital firms in the Midwest. NFTE is a non-profit organization focused on helping build entrepreneurial skills among high school students in under resourced communities. Mr Green is a co-author of two books on energy trading and has served as a guest speaker at multiple energy and private equity industry conferences. He has also been a guest lecturer at several universities including Terry/University of Georgia, University of Dayton, Kelstadt/Depaul University and Kellogg/Northwestern University.
J. TIM SNAVELY - Portfolio Manager, Crawford Investment Counsel, Atlanta, GA
Tim Snavely, CFA, CMT manages investment portfolios for families and institutional clients. The equity investment framework focuses on fundamental company research, quantitative research, monetary policy, fiscal policy, and credit markets. Tim began his career as a research analyst in equity market strategy at a broker-dealer where he developed analytics, strategy, tactical, stock and ETF recommendations for advisors and institutional clients. After working in equity market strategy, Tim moved to the institutional equity trading desk, sharing research and strategy with large mutual funds and hedge funds, including long/short equity, event-driven, merger arbitrage, and hybrid funds. Tim also previously served as Secretary, Vice President, and Treasurer for a nonprofit association for securities market analysts - leading the adoption of best practices in key areas such as governance, budgeting, and financial controls. Tim graduated from Emory University's Goizueta Business School with the Partnership Award in Finance, presented to the most outstanding undergraduate student in finance. His investment experience includes stocks, bonds, ETFs, mutual funds, derivatives, and alternatives. He is a member of the CFA Institute, Atlanta Society of Finance and Investment Professionals, and the Chartered Market Technicians Association.

TOM DORSEY - President of Dorsey Holdings and Founder of Dorsey, Wright & Associates, Richmond, VA
Tom Dorsey co-founded Dorsey, Wright & Associates in January 1987. Mr. Dorsey has over 40 years of experience in the financial services business, having started as a stock broker with Merrill Lynch Pierce Fenner & Smith in 1974. He is the author of nine books whose subject matter ranges from the Point & Figure methodology to motivational topics, and is regularly quoted in the financial media. Mr. Dorsey is an award winning speaker, having taught the Point & Figure method of investing, around the globe. Additionally, he has been recognized for his business acumen with various awards including the Citizens Community Award from Governor Charles Robb, Runner-up Ernst & Young Entrepreneur of the Year Award 1999, Runner-up Best Small Business of Richmond, VA 2000, and Alumni of the Year 2000, Virginia Commonwealth University as well as Star Alumni Virginia Commonwealth University 2015. He was also recently recognized as a Market Technicians Association “Living Legend” Mr. Dorsey’s personal interests have also led to recognition as he is a Former AAU World Record Holder in Powerlifting (50 - 55 age group) and the American Record Holder in Powerlifting (50 - 55 age group); All State Records in age group. He has completed the Adventurers “Rickshaw Run” from north to south India and is an FAA licensed Hot Air Balloon Pilot.

JIM CARROLL - Managing Partner, LongRun Capital Management LLC, New York, NY
Jim Carroll founded LongRun Capital Management in 2003 to manage investments for high net worth families and related trusts and charitable vehicles. LongRun offers a set of quantitative strategies designed for specific objectives: aggressive growth, absolute return and tax-managed growth. LongRun also serves as sub-advisor for an insurance dedicated fund and a multi-manager volatility strategy. Mr. Carroll’s previous experience includes four years as Chief Financial Officer of a NASDAQ-listed company and sixteen years as an investment banker with Smith Barney, Kidder Peabody and Bear Stearns. He also served four years of active duty as an officer in the US Army. Mr. Carroll earned a BA in Psychology from Claremont McKenna College and an MBA from Harvard Business School.
DUSTIN BARR, CFA - Consultant and Director of Research, Carolinas Investment Consulting, Charlotte, NC
Dustin Barr serves as a Consultant and Director of Research at Carolinas Investment Consulting (CIC). He enjoys helping clients organize and simplify their lives and believes in an evidence-based approach to investing that focuses on the things that matter and the things investors can control. In his role as a Consultant, he specializes in working with: High performing corporate executives and business owners, including financial and investment professionals. In his capacity as Director of Research, Dustin runs the CIC Investment Committee and oversees the process for manager selection, capital markets forecasts, and asset allocation framework. Dustin frequently speaks to professional groups, investment clubs, and continuing education events for CPAs. Dustin joined CIC in 2015 after eight years at TIAA, where he served as Director of Investment Product management. In this capacity he oversaw the development and management of TIAA Asset Management (now Nuveen) mutual funds and variable annuities. Dustin holds the Chartered Financial Analyst® (CFA®) professional designation and is a member of the CFA® Institute and the CFA® North Carolina Society. He holds the FINRA Series 7, 63, and 65 licenses. A native of Mooresville, North Carolina, Dustin graduated from College of Charleston, where he was a four-year letterman on the Golf Team and served as Co-Captain his final season. He lives in Charlotte with his wife, Catherine, and two children, Maggie and Charlie. In his free time he enjoys spending time with family, traveling, and golfing. Dustin is a member and sub-committee chair of the United Way Central Carolinas Young Leaders Council and remains actively involved in College of Charleston’s business school and men’s golf team.

JOANNE HILL - Chief Advisor for Research and Strategy, CboeVest, McLean, VA
Dr. Joanne Hill has over 25 years of experience in research and strategy with an emphasis on indexes, options and quantitative investments. Prior to joining CboeVest, Dr. Hill worked with ProShares for eight years, as Head of Institutional Investment Strategy, focusing on ETF research and education, and spent 17 years at Goldman Sachs, where she was a Managing Director leading global equity index and derivatives research and advising institutional investors on strategies using index and risk management tools. A recognized leader in the financial industry, Dr. Hill is a recipient of the William F. Sharpe Indexing Lifetime Achievement Award and has published extensively on quantitative investment topics, index products, and derivatives. Dr. Hill is a co-author (along with Dave Nadig and Matt Hougan) of A Comprehensive Guide to Exchange-Traded Funds (ETFs) published by the CFA Institute Research Foundation. She heads the research committee for the "Q" Group and the CFA Institute Research Foundation where she is also a board member. She also serves on the editorial board of the Financial Analysts Journal and Journal of Index Investing. Money Management Executive named Dr. Hill one of the ten inaugural recipients of the Top Women in Asset Management Awards. She was a Founding Member and Co-President of Women in ETFs and currently serves on their board. She is a member of the Investment Committee of the Montgomery County Public School Defined Benefit and Defined Contribution pension plans. Prior to her career on Wall Street, Dr. Hill was on the faculty of the University of Massachusetts (Amherst) and she has a Ph.D. in Finance from Syracuse University.

JAMES SEYFFART, CFA — Bloomberg Intelligence, Bloomberg, Princeton, NJ
James Seyffart is an Analyst covering ETFs and the broader fund industry (and to a lesser extent, Crypto Assets). In this role, he writes research for Bloomberg Intelligence (BI ETFS<Go> and BI COMD<Go>) and assists in the production of Bloomberg's ETF IQ, the only TV show fully devoted to all things ETFs. Before becoming an analyst with Bloomberg Intelligence, James spent the early parts of his career working in Bloomberg's data department. He maintained the data on US and Canadian Funds ranging from ETFs to Hedge Funds but primarily focusing on the ETF space. He assisted in the creation and development of multiple ETF functions on the terminal. James is a Chartered Financial Analyst (CFA®), a Chartered Alternative Investment Analyst (CAIA®) and a member of their New York societies/chapters. He has a B.S. in Finance and Accounting from The College Of New Jersey (TCNJ).

DUSTIN BARR, CFA - Consultant and Director of Research, Carolinas Investment Consulting, Charlotte, NC
Dustin Barr serves as a Consultant and Director of Research at Carolinas Investment Consulting (CIC). He enjoys helping clients organize and simplify their lives and believes in an evidence-based approach to investing that focuses on the things that matter and the things investors can control. In his role as a Consultant, he specializes in working with: High performing corporate executives and business owners, including financial and investment professionals. In his capacity as Director of Research, Dustin runs the CIC Investment Committee and oversees the process for manager selection, capital markets forecasts, and asset allocation framework. Dustin frequently speaks to professional groups, investment clubs, and continuing education events for CPAs. Dustin joined CIC in 2015 after eight years at TIAA, where he served as Director of Investment Product management. In this capacity he oversaw the development and management of TIAA Asset Management (now Nuveen) mutual funds and variable annuities. Dustin holds the Chartered Financial Analyst® (CFA®) professional designation and is a member of the CFA® Institute and the CFA® North Carolina Society. He holds the FINRA Series 7, 63, and 65 licenses. A native of Mooresville, North Carolina, Dustin graduated from College of Charleston, where he was a four-year letterman on the Golf Team and served as Co-Captain his final season. He lives in Charlotte with his wife, Catherine, and two children, Maggie and Charlie. In his free time he enjoys spending time with family, traveling, and golfing. Dustin is a member and sub-committee chair of the United Way Central Carolinas Young Leaders Council and remains actively involved in College of Charleston’s business school and men’s golf team.
GABE HENDERSON - Associate, Goldman Sachs, New York, NY

Gabe Henderson is an associate in the Real Estate Financing Group (REFG) at Goldman Sachs New York headquarters, where his primary responsibilities include underwriting and structuring commercial mortgage and mezzanine financings. REFG deploys the firm’s balance sheet on mortgage and mezzanine commercial real estate lending opportunities for the firm’s new-issue commercial mortgage-backed securities (CMBS) business and the firm’s bank portfolio. Gabe graduated from the College of Charleston Summa Cum Laude, with a bachelor’s degree in Finance, and a minor in Computational Thinking. After graduation, he worked in the Dallas REFG office for two years before transferring to the New York office in the summer of 2018.

ALBERTO DONOSO — Managing Director, Global Development, Greystar, Charleston, SC

Alberto Donoso is the portfolio manager for Greystar in Latin America; he is a member of the Mexico executive committee and serves as the senior director of development for Greystar in Mexico. Active in the real estate development industry since 2006, Alberto works closely with the company’s Latin America investment teams on strategic direction and execution of Latin America investment vehicles, and manages capital relationships with institutional partners. Prior to joining Greystar, Alberto worked as director of development for Kettler, a luxury multifamily developer in the Washington, DC area. Before that, he served in various construction management roles for Clark Builders Group, one of the largest multifamily general contractors in the US. Alberto holds an MBA with a concentration in finance from the University of Virginia Darden School of Business, and a bachelor of science in civil engineering from the University of Virginia.

THOMAS CARROLL - Partner, Ballast Rock Capital and Watermark Partners Real Estate, Charleston, SC

Tom has been an active real-estate investor for more than twelve years. His career on Wall Street has spanned the fourteen years prior to joining Watermark, most recently concluding nine years at Goldman Sachs & Co. as a trading desk head on the GS New York Fixed Income, Currencies and Commodities trading floor. His international career at both Goldman Sachs and previously at HSBC, has led him to live and work in New York, London, Dubai, and Sao Paulo. He has headed multiple desks primarily focused on structured financing, complex transaction execution, and institutional investor marketing at Goldman Sachs. He has used his international finance experience to support our growth strategy, with a particular focus on investor relations, marketing, and regulatory compliance. Tom has an MA (Hons) in Economics from the University of Edinburgh in Scotland.

OLIVIA COCO - Associate, Goldman Sachs, Dallas, TX

Olivia Coco is an Associate in Goldman Sachs’ Real Estate Financing Group, which participates in the origination of commercial mortgage backed securities. Ms. Coco graduated from the College of Charleston in 2015 and has been with the firm since. During her tenure at Goldman Sachs, she has helped originate over $1.0 billion in commercial real estate mortgages. While at the College of Charleston, Ms. Coco earned her BS in Economics with minors in Finance and Biology, was a Honors College graduate, a member of the Investment Society, a Schottland Scholar, and a student-athlete on the equestrian team.
MCLEAN WILSON - CEO, inFactor Corp, General Partner, Charleston Capital Management, Charleston, SC

McLean Wilson is a co-Founder and Manager of the Charleston Capital Management. Mr. Wilson has extensive experience in alternative investments, asset based lending, asset management and capital raising for alternative investments, as well as operational experience with structured transactions, recourse and non-recourse purchase agreements, back office operations, secured and unsecured transactions, negotiation, management and underwriting processes. Prior to Charleston Capital, Mr. Wilson was Vice President of SouthStar Capital, an asset based lender primarily focused on factoring, where he assisted in the origination, structuring, closing and funding of over $500 million worth of factored assets. While at SouthStar, he gained experience with structuring collateralized and non-collateralized transactions, purchase and sale agreements, and recourse and non-recourse financing. At SouthStar, Mr. Wilson also structured and funded numerous equipment lease and purchase order financing transactions. Prior to this, Mr. Wilson was an investment advisor with ING Financial Partners and Money Concepts Capital Corporation with a focus on financial planning, portfolio management and investment planning. Prior to being an investment advisor, Mr. Wilson was a Civil Engineer with Thomas & Hutton Engineering. Mr. Wilson is a graduate of Clemson University where he earned a Bachelor of Science and a Master of Science in Civil Engineering. Additionally, Mr. Wilson is a registered investment advisor representative (passed the Series 65 Exam).

JOHN LEWIS - Visiting Assistant Professor, The Citadel: The Military College of South Carolina, Charleston, SC

John Lewis has worked in the software, analytics and fund management industries and as a professor for 36 years. For the past eight years, he has been an Associate Professor in Finance and director of the Portfolio Management Master program at the IAE Gustave Eiffel Business School at the University of East Paris. He also provides training, mentoring and funding for early stage startups through his investment firm and accelerator Tektos. John had a similar investment vehicle in Paris under the name Dojoboost. He provided mentoring to startups at the government supported accelerator in Le Camping in Paris. Before advising startups, he sold three financial software startups. At Veraton he did projects and turn-arounds for venture and asset management firms. He was CEO at the startups, Scrittura, Risk Control Ltd and Versif which were acquired by larger firms. Before working in financial software startups, he created quantitative products and was a portfolio manager of pension funds at Putnam, NatWest Investment Management and PanAgora Asset Management. Early in his career, John held analysis and technology positions at the Organization for Economic Cooperation and Development (OECD) in Paris and McGraw-Hill/Data Resources Inc. in Washington DC. John has been a visiting lecturer at the University of Bath, IPAG Business School and Novancia Business School Paris. His research interests are in venture capital, credit risk, portfolio management and financial technology. John earned a BA in computer science from the University of Georgia and an MS in financial economics from Boston University. He is currently working on his PhD in finance at IAE Gustave Eiffel. Previously he was an Associate Professor in Finance at the École des hautes études commerciales de Paris (HEC). He started his research at Imperial College where he taught classes in corporate finance, derivative valuation, advanced valuation and advance portfolio management.

CHARLES CROW IV - Chief Data Scientist, Portfolio Manager, and Partner, Weiss Multi-Strategy Advisors, New York, NY

Chuck Crow joined Weiss in 2013, where he is currently the Chief Data Scientist, Portfolio Manager for the Weiss Alpha Balanced Risk products, and member of the Allocation and Risk Committees. Chuck and his team quantitatively measure discretionary manager's skill and behavior biases along a multitude of dimensions with the goal of positively influencing the investment process of PMs and Allocation Committee. Prior to joining Weiss, he was a Vice President in Quantitative and Derivatives Strategies at Morgan Stanley where he primarily focused on fundamental factors, quantitative portfolio construction and systematic long/short investment strategies. Previously, he designed and implemented an automated market-making system utilizing statistical arbitrage theory at ArtIsoft, Inc. in his hometown of Princeton, NJ. He holds a B.S. in Computer Science from Johns Hopkins University and an M.S. in Operations Research from Columbia University.
DEAN SMITH - Founder and Principal, Stonehenge Financial Partners, Charleston, SC
Dean Smith has been active in the structured finance markets for more than 25 years and is known throughout the industry as one of the pioneers of the non-prime and alternative mortgage. He began his financial career at FSA, a monoline insurance company, where he designed credit enhancement technology for private label Mortgage-Backed Securities (MBS). He then went to work at a series of Wall Street investment banks, running securitization programs and trading new issue and secondary MBS. In 1996, Smith launched Stonehenge Financial Partners, a financial advisory firm that manages residential and commercial MBS portfolios for institutional clients. Stonehenge currently advises a large private equity fund on all of its mortgage-related investments and oversees several of their portfolio companies. Smith received a bachelor’s degree in economics from University of California, San Diego as well as an MA and MPhil in economics from Columbia University.

MARK BUONO - Managing Director—Investment Office, Global Atlantic Financial Group, New York, NY
Mark Buono joined Global Atlantic as a Managing Director/Portfolio Manager in 2014 and is responsible for the commercial real estate portfolio. Prior to Global Atlantic, Mark was a Managing Director at Goldman Sachs. In his twenty years at Goldman Sachs, Mark held various roles in the commercial real estate business. Mark started in research, and then ran secondary CMBS trading. He was then responsible for the commercial mortgage origination business with supervision over Goldman’s securitization and syndication of commercial mortgage debt. Mark finished his time at Goldman with responsibility over the workout and resolution of Goldman’s commercial real estate debt portfolio. Before Goldman Sachs, Mark was in research and trading at Freddie Mac and an academic at Rutgers University and Temple University. Mark earned a PhD in Economics from the University of North Carolina and a BS in Economics from the College of Charleston.

JOHN WISEMAN — Director of Fixed Income, Greenwood Capital, Greenwood, SC
Joining the team in 2006, John is the Director of Fixed Income, overseeing an array of taxable bond portfolios, as well as state-specific municipal bond portfolios. He especially appreciates uncovering value and then seeing the market recognize that value. John is also a Principal of Greenwood Capital. Prior to joining Greenwood Capital, John was Senior Portfolio Manager for a $2 billion fixed income investment firm in Charlotte, NC. He also spent four years in the State of South Carolina Treasurer’s Office co-managing the fixed income assets of the state and its retirement system, where he was responsible for constructing and implementing investment strategies for the $17 billion pension plan and $5 billion general fund. A native of Newberry, SC, John is a graduate of Wofford College. He has also completed the professional study program at the Institute for Public Finance, Kellogg School of Management at Northwestern University.