Market Pricing In Six Rate Hikes by the End of 2022

Inflation spikes show 7+% year over year gains, marking the largest price increases since the early 80s. The market is now pricing in at least six rate hikes by the end of 2022 as the Federal Reserve tries to curb inflation.

Global Tensions Rising

Conflict between Russia and Ukraine keeps global investors on edge as Russia invades the Ukraine causing commodities to soar and volatility to spike.

Valuations Fall to their Lowest Point in 2 Years

U.S. stocks are at their cheapest point in nearly two years following the early-year selloff in growth stocks. Some of the best performing sectors YTD are those that ended with the lowest P/E ratios in 2021.

US Treasury Yields Jump

Following hot inflation reads last month, the 10-year Treasury spiked above 2% for the first time since 2019. The curve has been flattening as the short end spikes more quickly than the back end causing investors to ask “Will the yield curve invert?”
ITINERARY

8 a.m. - 9 a.m.  
Registration with Meet & Greet  
Breakfast sponsored by Aptus

9 a.m. - 10:15 a.m.  
Global Market Outlook

10:30 a.m. - 11:45 a.m.  
Investment Strategies

12 p.m. - 1:30 p.m.  
Networking Luncheon  
Sponsored by Truist

1:30 p.m. - 2:30 p.m.  
Breakout Session One  
Digital Finance/Cryptos, Fixed Income Investing, The Power of Business Culture

2:45 p.m. - 3:45 p.m.  
Breakout Session Two  
Private Equity Investing, Active & Passive Investing, ESG: Bug or Feature?

4 p.m. - 5 p.m.  
Breakout Session Three  
Real Estate Investing, Quant Investing, A Deep Dive into Deep Value

5 p.m. - 6:30 p.m  
Closing Reception  
Sponsored by J.P. Morgan
Kristina Hooper • Chief Global Market Strategist, Invesco US
Kristina Hooper is Chief Global Market Strategist at Invesco. In this role, she leads Invesco's Global Market Strategy (GMS) Office, which has strategists on-the-ground in North America, Europe and Asia. Prior to joining Invesco, Ms. Hooper was the US investment strategist at Allianz Global Investors. Prior to Allianz, she held positions at PIMCO Funds, UBS and MetLife. Ms. Hooper earned a BA degree, cum laude, from Wellesley College; a J.D. from Pace University School of Law, where she was a Trustees' Merit Scholar; an MBA in finance from New York University, Leonard N. Stern School of Business, where she was a teaching fellow in macroeconomics and organizational behavior; and a master’s degree from the Cornell University School of Industrial and Labor Relations, where she focused on labor economics. Ms. Hooper is a Certified Financial Planner® (CFP), Chartered Alternative Investment Analyst (CAIA), Certified Investment Management Analyst® (CIMA) and Chartered Financial Consultant® (ChFC) professional.

David Kelly • Chief Global Strategist, J.P. Morgan Asset Management
Dr. David Kelly is the Chief Global Strategist and Head of the Global Market Insights Strategy Team for J.P. Morgan Asset Management. With over 20 years of experience, David provides valuable insight and perspective on the economy and markets to the institutional investor and financial advisor global communities. He is a keynote speaker at many national investment conferences and a frequent guest on CNBC, Bloomberg, and other financial media outlets. Prior to joining J.P. Morgan Asset Management, David served as Economic Advisor to Putnam Investments. He has also served as a senior strategist/economist at SPP Investment Management, Primark Decision Economics, Lehman Brothers and DRI/McGraw-Hill. David is a CFA® charter holder. He also has a Ph.D. and M.A. in Economics from Michigan State University and a B.A. in Economics from University College Dublin in the Republic of Ireland.
Larry Adam • Chief Investment Officer, Raymond James

Larry Adam joined Raymond James in 2018 as CIO. Prior to joining Raymond James, Mr. Adam held the dual roles of CIO of the Americas and Global Chief Investment Strategist for Deutsche Bank Private Wealth Management. He was also a member of Deutsche Bank’s Global Investment Committee that formalizes and establishes the global house view. Prior to being named Deutsche Bank’s Global Chief Investment Strategist, Mr. Adam was the head of the Asset Allocation and Quantitative Analysis Group. Mr. Adam received a B.B.A. with a concentration in finance from Loyola University Maryland and a Master’s Degree in Business with a concentration in finance from Loyola University Maryland. Mr. Adam has earned the CFA® designation, the CIMA® designation and the CFP™ certification. Mr. Adam has been featured prominently on CNBC and Bloomberg and is frequently quoted in well-known publications such as the Wall Street Journal and Barron’s.

Jack Ablin • Founding Partner and CIO, Cresset

Jack Ablin is the CIO leading Cresset’s investment strategy and providing investment policy and philosophy guidelines to the firm’s advisor teams and clients. Jack joined the organization in 2018 and has three decades of experience in money management. Jack was formerly the CIO with BMO Harris Bank. Jack is a frequent contributor to CNBC, Bloomberg, The Wall Street Journal and Barron’s. Jack served as a Professor of Finance at Boston University, Graduate School of Management. Jack was also a finalist in the 2020 Family Wealth Report Awards in the category of “Outstanding Contribution to Wealth Management Thought Leadership”. Jack earned an AB degree from Vassar College in New York, where he graduated with honors in Mathematics and Computer Science. Jack received an MBA with honors and graduated cum laude from Boston University in Massachusetts. He is a CFA charterholder and a member of the CFA Society of Chicago.

John Stoltzfus • Managing Director, Chief Investment Strategist, Oppenheimer Asset Management

John Stoltzfus joined Oppenheimer as Managing Director and Chief Market Strategist in April 2012. A veteran of the financial services industry with over thirty years of experience in the financial markets, his work emphasizes inter-market analysis of multiple asset classes, combined with global market strategies. John follows cyclical and secular trends, sectors, geopolitics and macroeconomics. He also serves as an adjunct professor at the School of Continuing and Professional Studies at NYU, where he teaches post-graduate courses: Inter-Market Analysis for Industry Professionals and for Non-Finance Professionals. He has also worked as a Senior Market Strategist at Bank of America and as Vice President and Manager of International Equity Marketing and Group Head of Domestic Equity Marketing at Morgan Stanley. He is a frequent guest on CNBC, Bloomberg Radio and TV, Reuters Television and Yahoo Financial among other media groups.
Teddy Fusaro • President, Bitwise Asset Management

Teddy Fusaro is President of Bitwise Asset Management, creator of the world’s first cryptocurrency index fund. In this role, he oversees the implementation of the firm’s strategy and execution of its business objectives to deliver Bitwise’s investment products to clients. Fusaro was previously Senior Vice President and Head of Portfolio Management and Capital Markets at IndexIQ, the ETF issuer unit of New York Life Investment Management, a firm with over $550 billion in assets under management. IndexIQ pioneered the use of self-indexing in ETFs and the use of listed instruments to develop and offer rules-based hedge fund replication strategies in transparent and regulated portfolios. Prior to IndexIQ, Fusaro was Vice President of Portfolio Management and co-head of Trading and Operations at Direxion Investments, a $13 billion alternative ETF manager. Earlier in his career, he spent time in both equity derivatives and credit derivatives at Goldman Sachs & Co. Fusaro has a B.A. in political science from Providence College in Providence, RI.

Luke Riddle • Founder, Dinosaur Dog, LLC

As a Naval Aviator Luke hunted pirates in Somalia and helped save lives in Iraq. He taught at a prominent New York university as well as at a chaotic children’s Sunday School in Charleston, SC. After three years in operations leadership at Coinbase, Luke founded Dinosaur Dog to advise, develop, and invest in compelling blockchain projects with the hope of making the world a little better for all of us. Luke’s passion is to build and create. He is an aspiring futurist, a chess novice, and a blockchain aficionado. Despite diverse career titles, he prefers to be known as a world traveling thalassophile, husband, and father of three. A reformed equities trader and bitcoin miner now turned investor, Luke spends his time pondering the future impact of emerging technologies, reading, and playing with his little ones on Sullivan’s Island.
BREAKOUT SESSION ONE:
Fixed Income Investing • 1:30 p.m. - 2:30 p.m.

Alex Roever • Head of U.S. Rate Strategy, J.P. Morgan Securities
Alex Roever is a Managing Director and the Head of US Interest Rate Strategy for J.P. Morgan Securities LLC. His team covers US government securities markets, interest rate derivatives and money markets. His views appear regularly in US Fixed Income Markets Weekly, which is available to the firm’s institutional clients. He is also a frequent contributor to J.P. Morgan’s At Any Rate podcast. Institutional Investor magazine has named Alex to its 2021 All-America Fixed Income Research Team, recognizing his team with #1 and #2 rankings, respectively, for the US Fixed Income Strategy and the Short Duration Strategy categories. His market views are frequently highlighted in the financial press, and he has been featured on CNBC and Bloomberg Television. Alex is a CFA charterholder. He earned an MBA from Emory University, an MA in economics from Georgia State and a BA from Vanderbilt University.

Stephen Winterstein • Head of Municipal Fixed Income, MarketAxess Holdings
Mr. Winterstein joined MarketAxess in March 2019 as head of municipal fixed income. In his current position, he is responsible for municipal dealer and institutional client sales and trading at the world's premier electronic fixed income trading firm. He is integrally involved in every aspect of the municipal fixed income business at MarketAxess. Prior to joining MarketAxess, he was managing director and head of municipal strategy and research at Wilmington Trust Investment Advisors, Inc., and managing director and head of municipal fixed income at PNC Capital Advisors, LLC. Mr. Winterstein is an active member of the Advisory Committee for the Brookings Institution’s Hutchins Center on Fiscal and Monetary Policy Annual Municipal Finance Conference and a current member of the Board of Directors of the Municipal Bond Club of New York. He holds a BA in economics from Millersville University and an MBA from Lehigh University.

John Wiseman • Director of Fixed Income, Greenwood Capital
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. 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.

Session Sponsor
BREAKOUT SESSION ONE:
The Power of Culture • 1:30 p.m. - 2:30 p.m.

Sandra Sturkie • Director of Organizational Development, WebsterRogers
Sandra Sturkie currently serves as the Director of Organizational Development for WebsterRogers LLP, a leading South Carolina-based accounting and consulting firm that provides clients with a broad spectrum of assurance, tax, and advisory services. Sandra leads the Firm’s programs and initiatives for Leadership Development and Company Culture. She developed the Firm’s three level Leadership Academy, provides Executive Coaching and seeks to ensure that team members focus on exploring their compelling purpose.

Sandra received both her B.S. and M.S in Clinical Psychology from Francis Marion University. Sandra holds a Leadership Circle Profile Certification as well as being certified through the John Maxwell Leadership Coaching Program.

Lauris Woolford • Principal & Executive Coach, Woolford & Associates
Lauris is an executive coach and leadership consultant with over 33 years of hands-on experience in coaching leaders and teams, and in supporting positive cultural transformations. She brings real-world leadership perspective gained from managing multiple retail operations, a corporate university, and leading an Organization Development division for a Fortune 500 financial services company.

Lauris spent 15 years at Fifth Third Bank in senior executive leadership positions. She completed her career at Fifth Third as the Executive Vice President of Organization Development and Planning. It was in that role that she structured a talent management process facilitating the development for thousands of leaders.

Lauris earned her Masters of Science in Positive Organization Development and Change from Case Western Reserve University and her Bachelor of Science in Art Education at Edgecliff College (now Xavier University). She holds a Coaching Certificate from Case Western Reserve University and is a Board Certified Coach through the Center for Credentialing & Education.

Thomas Heath • Founder and Personal Brand Specialist, Thomas Heath Advisors
Thomas Heath is an expert in employer branding who teaches that core values are the GPS of a company’s culture. His clients count on him to create compelling visual content about their workplace culture to attract top talent. He regularly speaks for the American Marketing Association, DisruptHR, Ellevate Network, and the Society of Human Resource Professionals (SHRM), to name a few. In addition, Thomas is a guest lecturer at the College of Charleston MBA Program, The Citadel, Charleston School of Law, and Charleston Southern University on branding and messaging. On a personal note, Thomas is the playwright and songwriter in residence at the historic Queen Street Playhouse, where he has just created a rock musical. Follow him on LinkedIn at #askthomasheath.

Session Sponsor
aidentified
Scott Conners • Managing Director and President, FlowStone Partners
Scott Conners is a Managing Director, President and Investment Committee Member with FlowStone Partners. Scott is responsible for product development, fundraising, transaction origination, due diligence, structuring, and closing. Prior to joining FlowStone Partners, Scott spent 22 years at Landmark Partners, one of the leading private equity and real estate secondary purchasers. He joined Landmark in 1993 in the very early days of the private equity secondary market’s development. Scott participated in the market’s growth from less than $500 million per year in transaction volume to over $40 billion a year. Scott retired in 2015 as a Partner with responsibility for co-managing Landmark’s private equity secondary activities, with over $11 billion in committed capital. Scott received his B.A. in Business Economics from the University of Maine at Farmington and his M.B.A. from Penn State University. He has been a CFA charterholder since 1996 and is a member of the Hartford Society of Financial Analysts.

Jim Jeffries • CIO, Wells Fargo Strategic Capital
Jim Jeffries is Chairman and CIO for Wells Fargo Strategic Capital (WFSC), the merchant banking business of Wells Fargo. In this role, he is responsible for directing the efforts of the investing team across target focus areas, including healthcare, technology, energy and diversified industries, as well as limited partner investments in qualified funds. Prior to joining Strategic Capital, Jeffries served as co-head of the Loan Syndications and High Yield Debt Capital Markets group for Wells Fargo Securities and was a member of the Operating Committee for the Investment Banking and Capital Markets business. Jeffries has more than 25 years of investing and capital raising experience across a wide variety of industries. Jeffries earned a B.S. in Business from Miami University and an MBA from the Kenan-Flagler Business School at the UNC, Chapel Hill. He currently resides in Charlotte, NC with his family.

Kevin McCarthy • Co-Founder and Partner, Kian Capital Partners
Kevin co-founded Kian Capital and is responsible for all activities including origination and evaluating investment opportunities, structuring and negotiating transactions, managing portfolio investments, and investor relations. He has spent over 25 years working with lower middle-market companies. Prior to Kian, Kevin was the head of Wachovia Securities’ (now Wells Fargo Securities) Middle Market Capital Group, which provided debt capital to lower middle-market companies. He was the head of the investment committee and had oversight for a $1.0+ billion portfolio. Prior to Wachovia’s Middle Market Capital Group, Kevin was a Partner with CGW Southeast Partners, an Atlanta-based lower middle-market private equity firm with over $750 million of capital under management. Kevin earned a B.S. in Commerce from the McIntire School of Commerce at UVA and an M.B.A. from the Fuqua School of Business at Duke University.
BREAKOUT SESSION TWO:
Active and Passive Investing • 2:45 p.m. - 3:45 p.m.

John Carew • President, Tandem Investment Advisors
John Carew is a shareholder, President, and Portfolio Manager for Tandem Investment Advisors, Inc. After beginning his career in 1985 with Thomson McKinnon Securities, Inc., Mr. Carew founded Tandem in 1990. Under Mr. Carew’s guidance, Tandem’s investment team has been nationally recognized numerous times by leading manager databases for performance and lower volatility. Mr. Carew is a frequent guest speaker on topics including dividend growth strategies, low volatility equity investing, and general market history and overview. Mr. Carew is a past National Board Member and Regional Board Chair for Recording for the Blind & Dyslexic (now Learning Ally), a non-profit organization dedicated to providing access to the written word. Mr. Carew is a graduate of the University of Virginia with a Bachelor of Arts in Economics.

JD Gardner • Chief Investment Officer, Aptus Capital Advisors
JD holds an undergrad degree in Finance and an MBA with a concentration in Finance from Wright State University. He holds both the CFA Charter and Chartered Market Technician (CMT) designations. He spent time at UBS, Morgan Stanley, and as a research analyst before starting Aptus. With experience in developing systematic strategies, he saw the opportunity to use the efficiencies and transparency of the ETF structure to deliver more active, risk-mitigated exposures.

Craig Lazzara • Managing Director, S&P Dow Jones Indices
Craig Lazzara is a Managing Director in the Core Product Management group at S&P Dow Jones Indices (S&P DJI). His focus is on providing thought leadership and educational outreach for S&P DJI’s core, alternative beta, and style indices globally. Prior to assuming his current role, Craig founded the Index Investment Strategy team, which provides research and commentary across the S&P DJI product set, with particular emphasis on the active vs. passive debate, factor indices, and index dynamics.

Before S&P DJI, Craig was a managing director of Abacus Analytics, a quantitative consulting firm. He previously directed marketing and client service for ETF Advisors and Salomon Smith Barney’s Global Equity Index Group, as well as for the Equity Portfolio Analysis group at Salomon Brothers. A CFA charterholder, Craig is a graduate of Princeton University and Harvard Business School.

Session Sponsor
BREAKOUT SESSION TWO:
ESG: Bug or Feature? • 2:45 p.m. - 3:45 p.m.

Sabina Chatterjee • Director, ESG Solutions, Wells Fargo
Sabina is a Director in the ESG Solutions Group in Corporate & Investment Banking (CIB), where she helps deliver thought leadership and a full suite of products aimed at helping clients achieve their ESG objectives. Prior to joining the ESG Solutions Group, Sabina was part of the Investment Banking team, where she led coverage of Chemicals clients. Prior to making the shift to banking, Sabina spent 11 years in equity research, including 7 years covering the Chemicals sector between Wells Fargo Securities and BB&T Capital Markets, and 4 years covering the Machinery & Diversified Industrials sector at J.P. Morgan. Sabina earned her MBA and MEM degrees from the Kellogg School of Management and the McCormick School of Engineering at Northwestern University, and a BS and BE in Biology and Chemical Engineering from New York University and Stevens Institute of Technology.

Christopher McKee • CEO and Owner, The PRS Group
Christopher McKee is CEO/Owner of the PRS Group Inc - for over 40 years, the world’s leading quant-driven geopolitical risk rating and forecasting firm. Since 2006, Christopher headed the International Country Risk Guide (ICRG), supervising a team of analysts globally. A former faculty member at the University of British Columbia, Christopher has lectured at Harvard, American University (DC), and Simon Fraser University. Christopher’s most recent book is titled Quid Periculum: Measuring and Managing Risk in an Age of Uncertainty (2021), which he co-authored and edited with Peter Marber (Harvard/Aperture Investors).

James Seyffart • ETF Research Analyst, Bloomberg LP
James Seyffart is an Analyst covering ETFs and the broader asset management industry (and to a lesser extent, Crypto Assets). In this role, he writes research for Bloomberg Intelligence and creates analytical tools for clients. 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 and still aids in this process today. 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).
Shane Shofield • Client Portfolio Manager, Invesco Real Estate
Shane Shofield is a Client Portfolio Manager at Invesco Real Estate. Shane’s primary responsibilities is to engage with broader Invesco distribution and grow IRE’s presence in the financial intermediary channel. Shane began his investment career in 1993 and joined Invesco Real Estate in 2020. Prior to joining Invesco, he was an Executive Vice President and Head of Institutional and Retail Intermediary Distribution for Hartman Real Estate. Prior to Hartman Real Estate, Shane was with JLL/LaSal-le Investment Management, Hines Real Estate, Franklin Templeton Investments, American Funds, Putnam Investments and began his career with Van Kampen Merritt. Shane earned a BBA with a major in Finance from University of Georgia and Master of Business Administration with a major in Management from Georgia State University. He is a Certified Investment Management Analyst (CIMA).
Michael Remigino • Executive Director, Head of Private Client Group, Graham Capital Management

Michael Remigino is a Managing Director for Graham Capital Management, L.P. ("GCM") specializing in U.S. retail market initiatives. Prior to GCM, Mr. Remigino was the National Sales Manager at Refco Alternative Investments where he was responsible for the distribution of alternative investments and for managing the sales and client-servicing program for the U.S. Prior to joining Refco, he was a managing director in charge of northeast regional sales for Berkeley Capital Management, marketing its various investment management strategies to financial consultants, high net worth individuals and institutions throughout Berkeley's distribution network. From 1992 to 2000, Mr. Remigino worked for Salomon Brothers Asset Management, most recently as First Vice President, Northeast Regional Marketing Manager. His earlier work for Salomon included acting as direct liaison between high net worth families and portfolio management staff. Mr. Remigino received a B.S. in Finance from Manhattan College in 1992.

Feifei Li • Partner, CIO, Research Affiliates

Dr. Feifei Li is a partner and CIO of Equity Strategies for Research Affiliates. Feifei leads the cross-sectional equity research and strategy design that supports the firm’s systematic active portfolios and smart beta indices. Feifei is a member of both the Research Affiliates Investment Committee and Management Committee. She has been instrumental in the design of Research Affiliates’ innovative investment solutions since she joined the firm in 2005, becoming director of research in 2009, head of investment management in 2015, and head of investment strategy in 2018 before assuming her current role as the head of equities in 2020. Feifei earned a BA from Tsinghua University’s School of Management and Economics in Beijing and a PhD in finance from UCLA. She holds the Financial Risk Manager designation.

Cannon Carr • CEO, CornerCap Wealth Advisors

Cannon is CEO & CIO of CornerCap Wealth Advisers, positions he has held since June 2020 and August 2007, respectively. Since joining the firm in 2007, he’s led the firm’s investment committee and oversees the firm’s investment strategies and process, stock and asset class research, and portfolio management. He also co-manages the three CornerCap mutual funds (Small Cap Value, Large Cap Value, and Balanced), as well as setting the overall strategic direction of the firm. Prior to joining CornerCap, Cannon was a senior equity analyst at CIBC World Markets (formerly Oppenheimer), covering IT business services (2006-07), wireless services (2001-05), and emerging telecom (1998-05). Cannon has provided commentary on CNBC, CNN, Lou Dobbs MoneyLine, and Bloomberg News. He has also been quoted in the New York Times, Wall Street Journal, Financial Times, and Fortune, among other publications. He was rated a five-star analyst by Zacks Research in 2006. Cannon has an MBA from Columbia Business School and a BA from Princeton University in Political Economy.

BREAKOUT SESSION THREE: Quant Investing • 4 p.m. - 5 p.m.

Session Sponsor

Cannon Carr • CEO, CornerCap Wealth Advisors

Cannon is CEO & CIO of CornerCap Wealth Advisers, positions he has held since June 2020 and August 2007, respectively. Since joining the firm in 2007, he’s led the firm’s investment committee and oversees the firm’s investment strategies and process, stock and asset class research, and portfolio management. He also co-manages the three CornerCap mutual funds (Small Cap Value, Large Cap Value, and Balanced), as well as setting the overall strategic direction of the firm. Prior to joining CornerCap, Cannon was a senior equity analyst at CIBC World Markets (formerly Oppenheimer), covering IT business services (2006-07), wireless services (2001-05), and emerging telecom (1998-05). Cannon has provided commentary on CNBC, CNN, Lou Dobbs MoneyLine, and Bloomberg News. He has also been quoted in the New York Times, Wall Street Journal, Financial Times, and Fortune, among other publications. He was rated a five-star analyst by Zacks Research in 2006. Cannon has an MBA from Columbia Business School and a BA from Princeton University in Political Economy.
Robert Robotti • Founder and CIO, Robotti & Company

Robert Robotti is the Chief Investment Officer of Robotti & Company. Prior to forming Robotti & Company, Bob was a vice president and shareholder of Gabelli & Company, Inc. As an active owner/investor, Bob currently serves on the Board of Directors of a NYSE-listed real estate company, AMREP Corporation; as Chairman of the Board of Directors of Pulse Seismic Inc., a seismic data licensing business located in Calgary, Alberta; as an Independent Director of PrairieSky Royalty, a TSX listed company in Calgary, Alberta, having the largest portfolio of sub-surface mineral rights in western Canada; as an elected Director of NYSE-listed Tidewater, Inc. which owns and operates one of the largest fleets of OSVs (Offshore Support Vessels) in its industry. Bob holds a BS from Bucknell University and an MBA in Accounting from Pace University.

David Marcus • Founder and CEO, Evermore Global Advisors

David Marcus is Co-Founder, CEO and CIO of Evermore Global Advisors, LLC. David is portfolio manager of the Evermore Global Value Fund. Beginning his career in 1988 at Mutual Series Fund, 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, Mr. Marcus closed Marcstone, co-founded a family office for the Stenbeck family, and advised on the restructuring of a number of public and private companies the family controlled. David later founded and served as Managing Partner of MarCap Investors LP. David graduated from Northeastern University with a B.S. in Business Administration and a concentration in Finance.
Mark Buono • Director, Carter Real Estate Center
Mark Joseph Buono is currently a Visiting Instructor and Interim Director of the Carter Real Estate Center at the College of Charleston. Before his retirement, Mark was a Managing Director and Commercial Real Estate Portfolio Manager at the Global Atlantic Financial Group. Mark was a Managing Director at Goldman Sachs where he held various roles in the commercial real estate business for 20 years prior to his move to Global Atlantic. Before Goldman, Mark was in research and trading at Freddie Mac and an academic at Rutgers University and Temple University. Mark earned a Ph.D. in economics from the University of North Carolina at Chapel Hill in 1986 and a B.S. in economics from the College of Charleston. He lives in Charleston, SC with his wife, Judith.

Pete Costa • Chief Investment Officer, Costa Family Office
Peter P. Costa is a former Governor with the NYSE, where he began as a clerk on the floor over 30 years ago. As head of the Costa Family Office, he is responsible for managing the wealth of the Costa family who acquired their wealth through their involvement with Horizon Kinetics LLC. Holding senior trading positions at Lehman Brothers, Francis P. Maglio Inc., Bear Stearns, and Eckhart & Company, Mr. Costa cofounded Empire Executions Inc. in 2008. Mr. Costa served as a Governor for 12 years, and a CNBC analyst for 26 years. He currently serves on the Business Advisory Board of Meridian Wealth Management as well as the Advisory Board of Deep Knowledge Investing. A proud alumnus of the University of Tennessee, Mr. Costa serves on the Board of Advisors of the University of Tennessee Torchfund and is also a member of the Haslam School of Business Faculty Advisory Board.

Will Dubé • Associate, East Rock Capital
Will Dubé is an Associate at East Rock Capital, a multi-family office focused on investing alongside private equity sponsors across a diverse set of asset classes and industries. He previously spent three years at Frontier Growth, a growth equity firm focused on investing in software companies. Will graduated from the College of Charleston with a Bachelor of Science degree in Finance.
Kyle Ginty • Senior Investment Analyst, Vanguard
Kyle Ginty is a two-time graduate of the College of Charleston, 2008 - B.S. Economics & 2011 - M.B.A. concentration in finance. Kyle is currently employed by the investment management firm Vanguard as a Senior Investment Analyst for their US Retail Advice Methodology division specializing in portfolio construction. Kyle has been with Vanguard for the last 10 plus years beginning his career there in late 2011. During his tenure at Vanguard Kyle has held several positions across the retail, finance, and fixed income investment management divisions. Highlights of his time at Vanguard include roles as a trader on Vanguard’s Global Bond Indexing desk and an international assignment in London managing the implementation and research functions for Vanguard’s Global Fund Accounting division.

Joanne Hill • Board Governor, CFA Institute
Dr. Joanne Hill currently serves as Chief Advisor for Research and Strategy at CboeVest, a fund manager specializing in option-based investments. Prior to these roles, she was Head of Institutional Investment Strategy at ProShares, and also spent 17 years at Goldman Sachs, where she was a Managing Director leading global equity index and derivatives research and advising institutional investors on index and risk management strategies. She is a recipient of the William F. Sharpe Indexing Lifetime Achievement Award and has published extensively on quantitative investment topics, index products, and derivatives. She was one of the ten inaugural recipients of the Top Women in Asset Management Awards. Her board activities include serving as on the Board of Governors of the CFA Institute, Chair of the Board for the CFA Institute Research Foundation and on the Board of the "Q" Group (Institute for Quantitative Finance).

Mitsy Mangum • Managing Director, Lakeview Capital Partners
Mitsy Mangum is a financial advisor and wealth management specialist. Mitsy was the first female domestic over-the-counter trader at EF Hutton. She continued to break barriers on Wall Street, and in 1999, joined Smith Barney where she achieved the level of Vice President. She was the first female in that branch of 50 total advisors. From there, Mitsy achieved Vice President status at Raymond James and was awarded President Council status. In 2015, she joined Lakeview Capital Partners where she serves as Managing Director, Equity Partner and sits on the Investment Committee. Mitsy was a proud member of the College’s champion volleyball team that won divisionals, regionals and ultimately went to nationals. Mitsy remains an active alumna of the College of Charleston. In December 2019, Mitsy was the Commencement speaker and received an Honorary Doctorate from the College. She now sits on the Foundation Board for the College.
MODERATORS

Paul Meeks • Professor of Practice, The Citadel
Paul Meeks, CFA, CAIA: Meeks has been an equity analyst or portfolio manager since 1987. He has worked for various institutional investors. Meeks is probably best known for managing the world’s largest technology mutual funds franchise for Merrill Lynch Investment Managers. He's often in the media in print and on CNBC and other financial news outlets “talking tech.” In Charleston, he’s the Professor of Practice in the Baker School of Business at The Citadel. There he also advises the Student Managed Investment Fund that has over $1 million in assets. At his other day job, he’s a portfolio manager for Independent Solutions Wealth Management, which is a New York-based registered investment advisor.

Mark Pyles • Professor of Finance, Director of SB Investment Program, College of Charleston
Mark Pyles is a Professor of Finance at the College of Charleston, where his primary teaching roles include corporate finance, investments, and financial modeling at both the undergraduate and graduate levels. He also serves as the Director of the School of Business Investment Program. During his time at the College, Pyles has published over 40 articles in peer-reviewed journals and is the author of a textbook titled Applied Corporate Finance. Pyles obtained a M.S. in Economics and a Ph.D. in Finance from the University of Kentucky, completing the latter in 2005. He has been a roster faculty member at the College of Charleston since Fall 2005. He also holds the Chartered Financial Analyst (CFA®) designation and the Certificate in Investment Performance Measurement (CIPM).

Dean Smith • Chief Strategist, FolioBeyond
Dean Smith is currently the Chief Strategist for FolioBeyond, a quantitative asset management firm. Dean has over 25 years experience as an asset manager, trader and investment banker. His current area of focus is on the application of Machine Learning technology to fixed income assets, including mortgage backed securities and other structured credit products. Previously he was a partner at Highland Financial Holdings, a credit focused hedge fund, and prior to that he founded Stonehenge Financial Partners, a boutique investment banking firm. He started his career on Wall Street at DLJ and Nomura Securities. Dean completed his undergraduate work in economics at UC San Diego and received M.A and M.Phil degrees in economics from Columbia University. He is currently teaching a class in Machine Learning for Financial Applications at the College of Charleston.
8th ANNUAL INVESTMENT SYMPOSIUM SPONSORS
DIRECTORS

Dr. Mark Pyles Director  Dr. Kenneth Soyeh Associate Director

2022 INVESTMENT SOCIETY STUDENTS

Georges Mahama
Managing Director

Olivia Staff
Managing Director

Drew Asadorian
Chief Investment Officer

Landon Badgett
Chief Operating Officer

André Limón
Director of Quantitative Strategies

Trevor Cobb
Private Equity Manager

Jack Oistad
Chief Economist

Nathaniel Falck
U.S. Economist and
Director of Special Events

Lucas Ruszkowski
U.S. Economist

Tyler Kairis
Asian Economist

Oliver Steinberg
European Economist

Vinicius Nunes Lopes
Latin American Economist

Victor Jimenez
Emerging Markets Economist

Ryan Moosbrugger
Fixed Income Analyst

Joseph Del Guercio
U.S. Markets Analyst

Roy Aish
Private Equity Analyst

Anthony Spinella
Private Equity Analyst

Zoe Migliozzi
Portfolio Performance Analyst

Jody Bell
ESG and Portfolio Strategies Analyst

Emma Parisi
Portfolio Strategies Analyst

Alex Krauss
Portfolio Strategies Analyst

INVESTMENT PROGRAM ADVISORY BOARD

Walter Green, Chair of Advisory Board, J.P. Morgan (Retired)
– Charleston & Chicago

Stephen Kerrigan, Chair Emeritus of Advisory Board, Private Investor & Consultant
– Charleston

Ben Carew, Vice Chair, Tandem Investment Advisors – Charleston

Andrew Hendricks, Committee Chair, Capasso Planning Partners – Charleston

Elizabeth Hammond,
KKR – New York

Katrina F. Sherred,
Research Affiliates – Newport Beach, CA

Jay Tucker,
Enable Investment Management
– New York

Christopher Bass, Blackstone – New York

Joanne Hill, CboeVest – Charleston

Mitsy Mangum, Lakeview Capital Partners – Atlanta

Keith Sauls, Exeter Venture Group – Charleston
8TH ANNUAL STRATEGIC INVESTMENT SYMPOSIUM
MARCH 11, 2022