

OUTLOOK 2014

FOSTERING PEER TO PEER COLLABORATION

AGENDA

Monday, November 10

8:30 AM	Registration
9:00	Welcome – Jason Wilder, NAAIM President
9:15 – 9:45	The Value of Peer Input: Building a Successful Hedge Fund – Michael Price, Price Capital Management
9:45	Break
10:00 – 11:00	Concurrent marketing and system design sessions: A) Overview of System Pitfalls and Biases – Dave Walton and Dave Witkin, StatisTrade (Dave Walton is 2014 Wagner Award 1 st Place Winner) B) The Dinner Seminar is Back...and Working (A Case Study) – Steve Williamson, Legacy Investment Group
11:00 – 12:00 PM	Peer-to-Peer Round Table Discussions – Various topics from attendee survey
12:00 – 1:30	Lunch – Sponsor Introductions
1:30 – 2:30	Due Diligence Panel Discussion: Know the do's and don'ts of presenting your strategy for distribution – Jason Wilder, CMG Capital Management; Jeff Pietsch, Concert Capital Management; Dave Walton, StatisTrade
2:30 – 3:00	Trading and Refreshment Break
3:00 – 5:15 PM	NAAIM Manager Showcase – Shark Tank Preliminary Presentations – 3 concurrent sessions
5:30 – 6:30 PM	Cocktail Reception

Tuesday, November 11

8:30 AM	Breakfast – Sponsor area
9:00 – 10:00	The Irony of Moneyball: Why is Baseball Better at Using its Data to Allocate Capital and Manage Risk than the Financial Industry? - Joe Peta, Author
10:00 – 11:00	Concurrent marketing and system design sessions: A) Impact of Biases on Trading System Performance – Dave Walton and Dave Witkin, StatisTrade (Dave Walton is 2014 Wagner Award 1 st Place Winner) B) Building a Thoughtful Relationship Between Manager and Investor – Venk Reddy, Zeo Capital Advisors
11:00 – 12:00 PM	Your Agenda, Your Conference Round Table Discussions – Audience Participation
12:00 – 1:30	Lunch

1:30 – 2:30

Concurrent marketing and system design sessions:

A) **Avoiding Biases through an Effective System Development Process** – – Dave Walton and Dave Witkin, StatisTrade (Dave Walton is 2014 Wagner Award 1st Place Winner)

B) **Improve your Social Media Marketing in 3 Easy Steps** – Jerry Broussard, Broussard Financial Group, LLC

2:30 – 3:15

Trading and Refreshment Break

3:15 – 4:30 PM

The Marketing Machine from Product to Consumer - NAAIM Member Panel Presentation

4:30 PM

Conference Adjourned

2014 NAAIM National Sponsor

GUGGENHEIM

Platinum Sponsors

