OUTLOOK 2014

FOSTERING PEER TO PEER COLLABORATION

AGENDA

Monday, November 10

8:30 AM  Registration
9:00  Welcome – Jason Wilder, NAAIM President
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 1st 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 – 1:00  Lunch – Sponsor Introductions
1:00 – 2:00  Due Diligence Panel Discussion: Know the do’s and don’ts of presenting your strategy for distribution – Carl Resnick, Guggenheim – Moderator; Jason Wilder, CMG Capital Management; Jeff Pietsch, Concert Capital Management; and Ted Lundgren, Hg Capital Advisors, LLC
2:00—2:15  Refreshment Break
2:15 – 4:15 PM  NAAIM Manager Showcase – Shark Tank Preliminary Presentations – 3 concurrent sessions
4:15 – 5:15 PM  Investing in an Age of Transformation -- John Mauldin, Chairman, Mauldin Economics
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 1st Place Winner)
B) Building a Thoughtful Relationship Between Manager and Investor – Venk Reddy, Zeo Capital Advisors
11:00 – 12:00 PM  Your Conference, Your Agenda - 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- Member Panel – Ken Graves, Capital Research Advisors, LLC; Ryan Redfern, Shadowridge Asset Management, LLC; and Paul Schatz, Heritage Capital
4:30 PM    Conference Adjourned

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