NATIONAL ASSOCIATION OF ACTIVE INVESTMENT MANAGERS

OUTLOOK 2018 | November 5 & 6 | Marriott Chicago O'Hare

AGENDA

Monday, November 5

8:00 AM	Registration
8:45 AM	**Welcome** – Steve Williamson, NAAIM President
9:00 – 10:00 AM	**Climbing the Wall of Worry | 2019 Market Outlook –** Will Geisdorf, CMT, ETF Strategist, Ned Davis Research
10:00 – 10:45 AM	**My Market Outlook | Member Panel** – Dave Moenning, Heritage Capital Research; Paul Schatz, Heritage Capital; and Michael Gayed, Pension Partners. Moderator: Ed Egilinsky, Direxion Investments
10:45 – 11:15 AM	**Refreshment Break**
11:15 – 12:15 PM	**The Pros and Cons of Financial Planning in your Practice | Member Panel** – Jody Team, Team Financial Strategies; and Laura Redfern, Shadowridge Asset Management, LLC. Moderator: Brian Humphrey, Advisors Preferred|CEROS
12:15 – 1:45 PM	**Lunch** – Sponsor Introductions
1:45 – 2:45 PM	**Stop Asking for Referrals and Start Earning Them** – Wayne Townsend, General Manager, Platinum Advisor Strategies
2:45 – 3:30 PM	**Share Class Dilemma –** Ron Rough, CFA, Director of Portfolio Management, Financial Services Advisory, Inc. and Jerry Jacobs, CFP®, President, Atlas Capital Management. Moderator: Roya Vassell, ProFunds
3:30 – 4:00 PM	**Refreshment Break**
4:00 – 4:45 PM	**What's Working for Your Business? Member Lightening Round –** Audience Participation
5:30 PM	Conference Evening Event

Tuesday, November 6

8:00 – 9:00 AM	Continental Breakfast – Sponsor Hall
9:00 – 10:00 AM	**Bond Market Facts & Fiction…Information that will Surprise You –** Marilyn Cohen, President, Envision Capital Management, Inc.
10:00 – 10:45 AM	**Stoking the Fire of Business Growth through Marketing | Member Panel -** Patrick Beaudan, Belvedere Advisors, LLC; Emily Frazier, Spectrum Financial, Inc.; and Dina Fliss, Global View Capital Management. Panelists will be discussing Social Media/Video, Distribution Channels and Client Events. Moderator: Carl Resnick, Guggenheim
10:45 – 11:15 AM	**Refreshment Break** – Sponsor Hall
11:15 AM – 12:15 PM	**Securing Alpha w/ Artificial Intelligence** – David Aferiat, Co-Founder, Managing Partner, Trade Ideas, LLC
12:15 AM – 1:15 PM	**Lunch**
1:15 – 2:00 PM	**Round Table Sessions: Small groups with attendee participation. Topics:** • **Marketing** – Moderator: Ryan Redfern, Shadowridge Asset Management, LLC • **Trading Techniques** – David Bush, ALPHATATIVE LLC **Managing Client Expectations/When Trades go Bad/Successes and Failures** – Jody Team, Team Financial Strategies
2:00 – 2:30 PM	**Refreshment Break**
2:30 – 3:30 PM	**Opportunity or Folly? Managing Proprietary Tactical Portfolios for Clients –** Jeffrey Cribbs, CFP®, Managing Principal, Chicago Wealth Management, Inc.
3:45 PM	**Conference Adjourns**