



# OUTLOOK 2020 AGENDA

## Tuesday, October 27

11:00 AM EST	<b>Is It Time to Buy or Bail?</b> - Sam Stovall, Chief Investment Strategist, CFRA Research
12:00 PM EST	<b>Hacker Craft: Preventing the Breach</b> – Robert Krug, Senior Security Architect, Avast
1:00 PM EST	Break
1:15 PM EST	<b>Technology in Your Practice</b>   NAAIM Member Panel
1:45 PM EST	Break
2:00 PM EST	<b>Investment Themes Q4 2020</b> – Dr. Claus te Wildt, Senior Vice President, Capital Market Strategy, Fidelity Investments
3:00 PM EST	<b>NAAIM Roundtable</b> – topic to be announced

## Wednesday, October 28

11:00 AM EST	<b>Nicholas Bohnsack</b> , President & Chief Operating Officer, Head of Portfolio Strategy, Strategas Research Partners
12:00 PM EST	<b>TBA</b>
1:00 PM EST	Break
1:15 PM EST	<b>Using Active Management to Navigate 2020</b>   NAAIM Member Panel
1:45 PM EST	Break
2:00 PM EST	<b>The Benefits of Dynamic Profit Harvesting (DPH)</b> – Robert Kendall, Managing Director, PortfolioXpert.com
3:00 PM EST	<b>NAAIM Roundtable</b> – topic to be announced

## Thursday, October 29

11:00 AM EST	<b>A Tale of Two Tails: The Melt Up and the Bear</b> - Mebane Faber, CEO, Cambria Investments
12:00 PM EST	<b>Scott Webb</b> , Founder, KitchenTraffic, Co.
1:00 PM EST	Break
1:15 PM EST	<b>Raising AUM in a Pandemic</b>   NAAIM Member Panel
1:45 PM EST	Break
2:00 PM EST	<b>How to Successfully Complete a 2020 SEC Exam and Avoid Costly SEC Findings, Client Refunds, and Arbitration/Litigation Proceedings</b> – Thomas Giachetti, Esq., Chairman, Securities Practice Group, Stark & Stark, Attorneys at Law
3:00 PM EST	<b>NAAIM Roundtable</b> – topic to be announced