

- 8:30 am **Welcome & Opening Remarks**
- Donald M. Cobin, CFA® - Chief Executive Officer, Kennedy Capital Management
- 8:40 – 9:30 am **Market Outlook**
- Senior Economist, Ryan James Boyle, shares thoughts on the current market, as well as potential opportunities and risks ahead.*
- Ryan James Boyle – Vice President, Senior Economist, Northern Trust
- 9:30 – 10:20 am **Consultant Roundtable**
- Industry consultants share their current initiatives, trends in asset flows and client needs, as well as their current market outlooks.*
- Moderator:
- Chuck Bryant – Director, Consultant Relations and Institutional Sales, Kennedy Capital Management
- Panelists:
- Miles Fortas, CPA, CFE – Senior Vice President, Senior Consultant, CBIZ
  - Brian A. Maxwell, CFA®, AIF® – Principal, Millcreek Capital Advisors
  - Steven Roth, CFA® - Managing Director, Chief Investment Officer, Dahab Associates
- 10:20 – 10:35 am **Break**
- 10:35 – 11:25 am **Fixed Income**
- An in-depth discussion of the current state of fixed income markets from industry leaders.*
- Stephen J. Douglass – Senior Economic Strategist, NISA Investment Advisors
  - Kevin D. Schuman, CFA® – Director, Client Services, NISA Investment Advisors
- 11:25 – 12:15 pm **Cybersecurity**
- A conversation on several of today's hot topics in cybersecurity, including phishing, ransomware, cybersecurity awareness, and approaches in privacy protection.*
- 12:15 – 1:30 pm **Featured Speaker (Lunch)**
- Ronald J. Kruszewski – Chairman of the Board of Directors and Chief Executive Officer of Stifel Financial Corp.
- 1:30 – 2:30 pm **CIO Roundtable**
- Chief Investment Officers share their industry experience, investment initiatives, and current market outlook.*
- Moderator:
- George A. Tarlas, CFA® – Senior Managing Director, Asset Consulting Group
- Panelists:
- Tony Graves – Chief Investment Officer, Kemmons Wilson Companies
  - Craig Husting, CFA® – Chief Investment Officer, Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS)
  - Frank Latuda, Jr., CFA® – Chief Investment Officer, Kennedy Capital Management
- 2:30 – 2:45 pm **Break**

2:45 – 3:45 pm

**ESG: Past, Present, and Future**

*An examination of the Environmental, Social, and Governance space: the evolution of client needs, reporting and data availability, and the future impact of ESG on the industry as a whole.*

Moderator:

- Aimee O'Connor, CFP® – Managing Partner, Marquette Associates

Panelists:

- Tim Kavanaugh – Director of Investments, Mercy Investment Services
- Christian McDonald, CFA® – Portfolio Manager, Kennedy Capital Management
- Zachary Rasure – Senior Analyst of Investments, Ascension Investment Management

3:45 – 4:45 pm

**Private Markets**

*A discussion of the current state of private markets from industry leaders, highlighting parallels with public markets, along with key distinguishing factors.*

- Benjamin Frede, CFA®, CAIA – Senior Portfolio Manager, Private Markets, Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS)
- John True – General Partner, Cultivation Capital
- Eric Wilcomes – Co-Founder and Managing General Partner, Taurus Private Markets

4:45 pm

**Closing Remarks**

- Donald M. Cobin, CFA® – Chief Executive Officer, Kennedy Capital Management

5:00 – 9:00 pm

**Cocktail Reception**

*Please check back for additional updates and speaker announcements.*