INSIDE ALTERNATIVES & ASSET ALLOCATION

AGENDA

2019 Agenda

October 29, 2019

7:30-8:20 AM

Registration And Continental Breakfast In Freedom Ballroom

8:20-8:30 AM

Introduction And Announcements

8:30-9:40 AM

A Deep Dive Into Private Markets

CE credits: 1.0 hour CFP Board and I&WI approved

After a 10-year bull market in public equities and relatively low expectations regarding future capital markets returns, many investors are considering the private capital markets for the first time. This special session opens with iCapital Network's Nick Veronis exploring the utility of private equity and its impact on a 60/40 portfolio. In particular, he will discuss how private equity firms create value and how incorporating P/E into a conventional 60/40 portfolio can impact returns, volatility and liquidity. Other speakers will discuss how building a tailored portfolio with alternative equity, credit and income investments can complement more traditional choices and deliver value to clients.

Moderator:

John Coyne, Spouting Rock

Speakers:

Brendan Finn, Artivest

Joel Kress, Pomona Investment Fund

Nick Veronis, iCapital

9:45-10:15 AM

Alternative ETFs For Low-Cost Diversification

Some advisors consider alternatives to be expensive. Today, there is a new class of ETFs that seek to deliver alternative strategies at lower costs. Get an overview of alternative ETFs, and find out how they structure and manage their portfolios. Can the risk/return characteristics of alternative ETFs help advisors enhance portfolio returns?

Moderator:

Jeff Schlegel, *Financial Advisor* Magazine

Speaker:

Edward Coyne, Sprott Asset Management

Rick Lake, F/m Acceleration

10:15-10:45 AM

Morning Networking Break In Freedom Ballroom

10:45-11:15 AM

Impact/ESG/SRI Investing

Hear how ESG is enhancing the investor experience even in the more inefficient and alternative areas of the market.

Speaker:

Pamela Jacobs, Spouting Rock

11:20-11:50 AM

Big Data: In Pursuit Of Alpha

Can advisors and portfolio managers successfully harness Big Data to achieve alpha and gain a unique investment edge?

In this interactive case study, Alex Morris, chief investment officer of F/m Acceleration, will illustrate an investment methodology and process that deploys Big Data systems to analyze 200,000+ properties in 325+ REITs around the world in pursuit of enhanced insight and portfolio returns.

The case study will reveal the multi-faceted process of building and analyzing large, complex data sets to identify overvalued and undervalued securities—and how to combine cutting-edge technology with common sense to create a practical, understandable approach to better outcomes with Big Data.

Moderator:

Rick Lake, F/m Acceleration

Speaker:

Alex Morris, F/m Acceleration

11:50 AM-1:15 PM

Fireside Chat And Buffet Lunch With Ali Motamed And Charles Clough

This wide-ranging discussion on the markets, the economy, fiscal and monetary policy, and geopolitics will examine the major risks and opportunities confronting financial advisors and their clients today. Learn how two award-winning investors expect events and markets to unfold over the next 18 months and how they are positioning portfolios.

Moderator:

Evan Simonoff, Financial Advisor Magazine

Speakers:

Charles Clough, Clough Capital Partners

Ali Motamed, Invenomic Capital Management

1:20-2:10 PM

Real Estate And Real Assets

CE credits: 1.0 hour CFP Board and I&WI approved

There are more ways to invest in real estate than most people realize. Beyond rental properties and REITs, many other products have provided returns to investors, including private funds, triple-net-lease vehicles, mortgage-backed securities, commercial mortgage loans, distressed properties and much more —all with the goal of providing attractive risk-adjusted returns and income for clients. Get a bigger picture of real estate opportunities and what to watch for.

Moderator:

Christopher Robbins, *Financial Advisor* Magazine

Speakers:

Anthony Potenza, LaSalle Investment Management

Jay Rollins, JCR Capital

Asheel Shah, EJF Capital

2:15-3:05 PM

Global Long-Short Equity: A Better Way To Approach Stocks Late In The Cycle?

Is long-short equity a better way to approach global stock markets this late in the economic and market cycle? With markets vulnerable, risk management and alpha may be available via hedging and shorts. On the long side, investors must be more selective than ever, rather than relying on momentum. Leading long-short equity managers will address both the upside and the downside across the globe. **Moderator:**

Rick Lake, F/m Acceleration

Speakers:

Jamie Carter, S.W. Mitchell Capital, F/m Investments

Ben Deschaine, Invenomic Capital Management

Vince Lorusso, Clough Capital Partners

3:05-3:35 PM

Afternoon Networking Break In Freedom Ballroom

3:40-4:30 PM

New Concepts In Fixed Income

CE credits: 1.0 hour CFP Board and I&WI approved

In an uncertain, low-interest-rate world, investors are looking for ways to generate fixed income and hedge against market volatility. Unconstrained bond funds, interval funds, interest rate neutral funds, structured notes, private debt instruments and other investments offer advantages: They may generate more stable income flows, allow managers to more quickly take advantage of market moves and provide a hedge against price and rate changes. Experienced managers discuss how they make decisions and what you should consider when investing in fixed-income alternatives for clients.

Speakers:

Mark Landis, Wavelength Capital Management

Jeffrey Lapin, Lord Abbett & Co.

Christian Wilson, Voya Investment Management

4:35-5:05 PM

Survival Guide To A Global Slowdown

The global economic outlook has darkened, with heightened trade tension and market volatility threatening to end the record-long U.S. expansion. Low interest rates and historically high valuations are two factors that challenge investors in the face of policy and growth uncertainty. During this presentation, FS Investments Chief Economist will cover:

• Where she thinks trade tensions will hit the economy and which two indicators she is watching to gauge the risk of recession
• Where investors can find stability and income amid chronically low interest rates and heightened volatility
• Why she is rethinking the implications of yield curve inversion

Speaker:

Lara Rhame, FS Investments

5:10-6:00 PM

Reception

6:15 PM

Dine Arounds