



7:30 AM – 7:55 AM	REGISTRATION	
MORNING SESSIONS - WEST LOUNGE – 1ST FLOOR		
7:55 AM – 8:00 AM	Welcome Remarks	Nicolas Bornozis, <i>President & CEO</i> – Capital Link, Inc.
8:00 AM – 8:40 AM	Are CEFs a Value Proposition Today?	<p>Moderator: Mariana Bush, CFA, <i>Head of CEF & ETP</i> – Wells Fargo Advisors</p> <p>Panelists:</p> <ul style="list-style-type: none"> • Robert F. Bush, Jr., <i>Senior Vice President</i> – Calamos Investments • David Sachs, <i>Partner</i> – Ares Management • Jim Robinson, <i>Founder, CEO & CIO, Senior Portfolio Manager</i> – Robinson Capital Management, LLC • John Bartlett, <i>Vice President, Portfolio Manager, Electric & Gas Utility Research</i> - Reaves Asset Management
ALTERNATIVE WAYS TO INVEST IN CEFS		
8:40 AM – 9:00 AM	Closed-End Funds: Access vs. Alpha	Ken Fincher, <i>SVP, Portfolio Manager</i> – First Trust Portfolios
9:00 AM – 9:20 AM	Perspectives on Closed-End Funds	Boaz Weinstein, <i>Founder and Chief Investment Officer</i> - Saba Capital Management, L.P.
INVESTMENT STRATEGIES		
9:20 AM – 9:40 AM	What's Next for Broad Commodities? Key Themes and Portfolio Solutions	Maxwell Gold, <i>Director, Investment Strategy</i> - ETF Securities
9:40 AM – 10:00 AM	Healthcare Investing in a Closed-End Fund Format	Daniel Omstead, <i>CEO</i> – Tekla Capital Management LLC
10:00 AM – 10:20 AM	COFFEE BREAK	
10:20 AM – 11:00 AM	Are Term Trusts the Wave of the Future or a Passing Fad?	<p>Moderator: Elias Lanik, <i>Senior Closed-End Fund Analyst</i> – BofA Merrill Lynch Global Research</p> <p>Panelists:</p> <ul style="list-style-type: none"> • Jeff Margolin, <i>Sr. Vice President, Closed-End Fund Analyst</i> – First Trust Portfolios • Robert Bush Jr., <i>Senior Vice President</i> – Calamos Investments • Michael Occi, <i>Executive Director, Global Capital Markets</i> – Morgan Stanley • Alex Reiss, <i>Director</i> – Stifel
11:00 AM – 11:20 AM	European Equity Update	Christopher Warren, <i>Managing Director</i> – Deutsche Asset Management

11:20 AM – 11:40 AM	Generate Dividends through Global Equity Income Investing	<ul style="list-style-type: none"> • Joshua Duitz, CPA, Portfolio Manager - Alpine Funds • Brian Hennessey, CFA, Portfolio Manager – Alpine Funds
11:40 AM – 12:20 PM	Cohen & Steers Alternative Income Institute <i>REITs, MLPs, Preferred Securities and Closed-End Funds</i>	<ul style="list-style-type: none"> • Brian Cordes, Senior Vice President, Portfolio Specialist – Cohen & Steers • Douglas Bond, Executive Vice President, Portfolio Manager – Cohen & Steers • Elaine Zaharis-Nikas, CFA, Senior Vice President, Portfolio Manager and Research Analyst – Cohen & Steers • Elliott Trencher, Vice President, Associate Portfolio Manager – Cohen & Steers • Tyler Rosenlicht, Vice President, Portfolio Manager – Cohen & Steers
12:30 PM – 1:30 PM NETWORKING BUFFET LUNCH		
AFTERNOON SESSIONS - WEST LOUNGE – 1ST FLOOR		
LEVERAGE IN CEFs		
1:40 PM – 2:20 PM	Use of Leverage in CEFs	Moderator: Greg Fayvilevich, Senior Director, Fund & Asset Management Ratings - Fitch Ratings Panelists: <ul style="list-style-type: none"> • Brian Knudsen, Associate Director, Fund & Asset Management Ratings - Fitch Ratings • Amit Jain, Director, Financial Institutions Investment Banking - Wells Fargo Securities • Mark Kelly, Director – Product Oversight – BlackRock • Andrew Kleeman, Managing Director, Private Placements - Barings
FINTECH: WORLD CLASS ALTERNATIVE INVESTMENT OPPORTUNITIES		
2:20 PM – 2:35 PM	Optimizing Advisor Access to Alternative Investment Opportunities: <i>Mercury iFunds: Leveling the playing field in favor of RIAs</i>	George Lucaci, Partner & Senior Advisor - Mercury Capital Advisors

INVESTING FOR YIELD		
2:35 PM – 3:15 PM	Uncovering Value in the BDC Industry	Thomas Alonso, CFA, VP, Investor Relations - Prospect Capital Corporation
3:15 PM – 3:55 PM	BDCs – Financing America's Growth	<p>Moderator: Rich Kendrick, Co-Head of Equity Capital Markets and Senior Managing Director – Stifel</p> <p>Panelists:</p> <ul style="list-style-type: none"> • Barry Sloane, Chairman & CEO – Newtek Business Services Corp. • Joshua Siegel, Chairman & CEO – StoneCastle Financial Corp. • Thomas Majewski, CEO – Eagle Point Credit Company Inc.
3:55 PM – 4:25 PM	Don't Miss the MLP Comeback!	<p>Moderator: Michael Jabara, Executive Director and Head of ETF and Closed-End Fund Research – Morgan Stanley Wealth Management</p> <p>Panelists:</p> <ul style="list-style-type: none"> • Ed Russell, Senior Managing Director - Tortoise Capital • Jay Hatfield, Co-founder and CEO – Infrastructure Capital Advisors • Benjamin Okin, Vice President – Goldman Sachs Asset Management
INNOVATION IN THE ETF SPACE		
4:25 PM – 4:55 PM	ETF Industry Roundtable	<p>Moderator: Tom Champion, Managing Director – Global Index and Exchange Traded Products Group - NYSE</p> <p>Panelists:</p> <ul style="list-style-type: none"> • Charles Thomas, Head of US ETF Capital Markets – Vanguard • Steve Sachs, Managing Director, Head of Capital Markets – Goldman Sachs • Grayson Lipton, Head of ETF Execution & Liquidity Services – Invesco PowerShares
5:00 PM – 6:00 PM	COCKTAIL RECEPTION	