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8:55 – 9:00 am

**Welcome Remarks**

**Mr. Nicolas Bornozis**, President – **Capital Link, Inc.**

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9:00 - 9:40 am

**CEF Industry Roundtable**

Moderator: **Mariana Fariña, CFA**, *Research Director - CEFs & ETPs/Passive Products - Wells Fargo Investment Institute*

Panelists:

- **Mr. Robert F. Bush, Jr.**, Senior Vice President, Director of Closed-End Fund Products - **Calamos Investments**
  - **Doug Bond**, Executive VP, Head of Closed-End Funds - **Cohen & Steers**
  - **Matthew J. Nealon**, CPA, Managing Director, Head of CEF Business Development – **Nuveen**
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9:45 -10:25 am

**Alternatives & Real Assets**

*REITs, Preferreds & Convertibles*

Moderator: **Alexander Reiss**, Managing Director, Equity Research, Closed-End Funds - **Stifel**

Panelists:

- **Jonathan Mondillo**, Head of U.S. Fixed Income – **abr dn**
  - **Barry Nelson**, CFA, Partner, Senior Advisor – **Advent Capital Management**
  - **Brian Cordes**, CAIA, Senior Vice President – **Cohen & Steers**
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10:25 – 10:50 am

**COFFEE BREAK**

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10:50 - 11:30 am

**New CEFs Brought to Market & Looking Ahead**

*(Panel organized by Clifford Chance)*

Moderator: **Jeffrey D. LeMaster**, Partner - **CLIFFORD CHANCE US LLP**

Panelists:

- **Stephen Minar**, Director - **BlackRock**
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11:35 - 12:15 pm

**The Use of Leverage**

*(Panel organized by Fitch Ratings)*

Moderator: **Peter Gargiulo**, Director - **Fitch Ratings**

Panelists:

- **Steve Johnson**, CFA, Associate Director - **Fitch Ratings**
  - **Brian Knudsen**, Vice President, Global Financial Institutions Group - **Sumitomo Mitsui Banking Corporation**
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12:25 – 2:00 pm

## LUNCHEON & KEYNOTE ADDRESS

### NAVIGATING THROUGH THE CHALLENGES & CAPTURING OPPORTUNITIES

*Investing in an Era of Energy Transition, Inflation, Geopolitics and Cryptocurrencies*



**Jan Van Eck**  
*President and Chief Executive Officer*  
Van Eck Associates Corporation

2:10 - 2:50 pm

### BDCs Roundtable – Financing America’s Growth

**Moderator: Al Laufenberg, CFA, Managing Director, Investment Banking - KEEFE, BRUYETTE & WOODS / Stifel**

#### Panelists:

- **John Kline, President – New Mountain Finance Corporation (NMFC)**
- **Ted Goldthorpe, Chairman & CEO - Portman Ridge Finance Corporation (PTMN) & Logan Ridge Finance Corporation (symbol: LRFC)**
- **Matt Stewart, COO - Oaktree Specialty Lending Corporation (OCSL)**
- **Michael Gross, Co-CEO - SLR Investment Corp (SLRC)**

2:55 - 3:35 pm

### ETF Industry Roundtable

**Moderator: Mo Sparks, Director- Exchange Traded Products - New York Stock Exchange**

#### Panelists:

- **Steve Cook, Managing Director, Head of ETFs - Harbor Capital Advisors**
- **Fred Edwards, CFA, ETF Sales, ETF Portfolio Specialist - Neuberger Berman**
- **Michael A Giuliano , CFA, Manager of Strategic Initiatives – Putnam Investments**

3:40 - 4:20 pm

### Analyst Roundtable

**Moderator: Mr. Robert F. Bush, Jr., Senior Vice President, Director of Closed-End Fund Products - Calamos Investments**

#### Panelists

- **Michael Jabara, Managing Director and Head of ETF and Closed-End Fund Research - Morgan Stanley Wealth Management**
- **Alexander Reiss, Director – Stifel**
- **Mariana Fariña, CFA, Research Director - CEFs & ETPs/Passive Products - Wells Fargo Investment Institute**

## COCKTAIL RECEPTION

4:25 – 5:30pm