CAPITAL LINK'S

Dissect ETFs Forum

Thursday, October 23, 2014
The Metropolitan Club, One East 60th St., New York City

IN COOPRERATION WITH

NYSE

2014 AGENDA

7:30 AM - 7:55 AM	REGISTRATION & BREAKFAST
7:55 AM - 8:00 AM	**WELCOME REMARKS** **Nicolas Bornozis**, *President* - **Capital Link, Inc.**
8:00 AM - 8:20 AM	**THE EVOLUTION OF THE ETF LANDSCAPE** **Gregory A. Friedman** *Senior VP, Head of Product Development and Strategy* - **Fidelity Investments**
8:25 AM - 9:05 AM	**INNOVATION IN ETFs** *Discuss the different innovative ETF products of 2014 and the future; Smart Beta explained; Alternative vs. Liquid Alternative ETFs; Factor Based Approaches* **Moderator:** **Deborah Fuhr**, *Managing Partner* - **ETFGI LLP** **Panelists:** • **Joseph Nelesen**, *Director, Head of Institutional Product Mgmt & Consulting* - **iShares** • **Kevin Quigg**, *Global Head of ETF Sales Strategy* - **State Street Global Advisors** • **Luciano Siracusano III**, *Chief Investment Strategist* - **WisdomTree** • **Robert Deutsch**, *Managing Director, Global Head of ETFs* - **JP Morgan Asset Mgmt.**
9:10 AM - 9:50 AM	**THE ART OF SUCCESSFUL ETF TRADING** *Discuss the different types of investment vehicles in a client's portfolio; How knowledgeable are clients with the different investment vehicles? How do ETFs fit in? How will ETF regulations impact your business and your clients? What does a successful advisor need to know? How to profile your client* **Moderator:** **Laura Morrison**, *SVP, Global Index & Exchange Traded Products* - **NYSE Euronext** **Panelists:** • **Reggie Browne**, *Senior Managing Director* - **Cantor Fitzgerald & Co.** • **Russell Latham**, *Director* - **Fidelity Investments** • **Stan Ueland**, *SVP & Portfolio Manager* - **First Trust Advisors** • **Ryan Szakacs**, *Vice President, Capital Markets* - **BlackRock**
9:55 AM - 10:35 AM	**USING ETFs IN CLIENT'S PORTFOLIOS** *Portfolio Construction & Strategies using ETFs; Discuss the different types of allocator: Strategic Asset, Tactical Asset, and/or Hybrid Asset* **Moderator:** **Joseph Nelesen**, *Director, Head of Institutional Product Mgmt & Consulting* - **iShares** **Panelists:** • **Ken Bossen**, *Head of ETF Portfolio Strategy & Due Diligence* - **State Street Global Advisors** • **Bill Miller**, *Director, iShares Institutional Sales Group* - **BlackRock** • **Jon Maier**, *Head of ETF Strategy* - **Bank of America Merrill Lynch**

10:40 AM - 11:20 AM	**ETFs & THE EVOLUTION OF INDEXING AND BENCHMARKING** *How is the ETF being benchmarked? What is the best benchmark in each area of the market? How is the indexing landscape shifting? How will this have an impact on institutional investors? What are the hidden costs?* **Moderator:** **Beverly Goodman**, *Assistant Managing Editor* - **Barron's** **Panelists:** • **Christopher Philips**, CFA, *Senior Analyst, Investment Strategy Group* - **Vanguard** • **Raina Oberoi**, *Vice President, Index Applied Research* - **MSCI** • **Tom Goodwin**, PhD, *Senior Director of Research* - **Russell Indexes**
11:20 AM - 11:50 AM	**NETWORKING COFFEE BREAK**
11:50 AM - 12:30 PM	**ACCESSING GLOBAL MARKETS THROUGH ETFs** *Help your client invest in global markets through ETFs; What are the different international assets ETFs invests in? Understanding currency risks* **Moderator:** **Michael Jabara**, *Executive Director, Head of ETF & CEF Research* - **Morgan Stanley Wealth Management** **Panelists:** • **Dodd Kittsley**, *Director, Head of ETF National Accounts & Strategy* - **Deutsche Asset & Wealth Management** • **Christopher Gannatti**, CFA, *Associate Director of Research* - **WisdomTree** • **Nigel Emmett**, *Managing Director, Client Portfolio Manager* - **JP Morgan Asset Mgmt.**
12:35 PM - 1:15 PM	**INVESTING FOR YIELD THROUGH ETFs** **Moderator:** **David Perlman**, *ETF Research* - **UBS** **Panelists:** • **Michael Akins**, *Portfolio Manager* - **ALPS ETF Trust** • **Matthew Bartolini**, *Principal, Research Strategist* - **State Street Global Advisors** • **Darren Schuringa**, *Managing Partner* - **Yorkville Capital Mgmt.**
1:20 PM - 2:00 PM	**COMMODITY ETFs** **Moderator:** **Eric Balchunas**, *ETF Analyst* - **Bloomberg** **Panelists:** • **John Gambla**, *Senior Portfolio Co-Manager* - **First Trust Advisors** • **John Hyland**, *Chief Investment Officer* - **United States Commodity Funds LLC** • **Mike McGlone**, *Director of Research* - **ETF Securities**
2:00 PM - 3:00 PM	**NETWORKING LIGHT LUNCH**