



TALKING HEDGE



# TALKING MANAGED FUTURES & GLOBAL MACRO: STRATEGIES TO OPTIMIZE INSTITUTIONAL PORTFOLIOS

NOVEMBER 2-3, 2016 | OMNI DOWNTOWN AUSTIN

## CONFERENCE GUIDE

# CONFERENCE SPONSORS

Deutsche Bank 





Welcome to the delegation of ***Talking Managed Futures and Global Macro: Strategies to Optimize Institutional Portfolios***. We are delighted you can join us and confident that you will receive a solid return on your investment in this event.

We formed Talking Hedge to bring together the best minds in alternative investing—allocators, managers and solutions providers—to have open and candid discussions about the challenges each group faces. Our events are designed specifically to give you time to talk and time to meet in a meaningful way. Our goal is for you to walk away with the information you need to meet the challenges of tomorrow.

We extend a special thanks to our partner Remy Marino and his team at **Deutsche Bank** for their partnership and creativity in helping us shape the discussion for a second consecutive year.

Our sincere appreciation to all of our sponsoring firms: **Abraham Trading Company, Arthur Bell, Campbell & Company, CME Group, Crow & Cushing, Efficient Capital Management, ISAM, Lyxor Asset Management, Quadratic Capital Management, RCM Alternatives, Sunrise Capital Management and Thales Trading Solutions** for recognizing the value of this forum and collaborating with us to ensure its success. A special shout-out to **RCM Alternatives** and **Arthur Bell** for sponsoring our opening reception!

We would also like to thank our stellar speaking faculty for taking the time to develop thoughtful and thought-provoking sessions that will provide much to discuss over coffee and cocktails.

We look forward to a constructive day of conversation and networking!

Kind regards,

Meg Bode  
Co-founder

Kristin Fox  
Co-founder

# CONFERENCE PROGRAM

## NOVEMBER 2, 2016 - AUSTIN SOUTH

6:00-7:30 **TALKING HEDGE WELCOME RECEPTION FOR ALL REGISTRANTS**  
Sponsored by RCM Alternatives and Arthur Bell

## NOVEMBER 3, 2016 - CAPITAL BALLROOM

7:30-8:30 **BREAKFAST AND WELCOME REMARKS**

8:30-9:00 ***ECONOMIC OUTLOOK: US BACK IN THE DRIVER'S SEAT OF A SLUGGISH WORLD ECONOMY***

Peter Hooper  
Managing Director, Chief Economist, Deutsche Bank Securities

9:00-9:45 ***EXPLORING MACRO & MANAGED FUTURES RETURNS AND THE CURRENT OPPORTUNITY***

Moderator: Cyril Beroit  
Managing Director, Head of Managed Accounts, H2O AM LLP

Panelists: Amy Elefante Bedi  
Director of Hedged Strategies, Washington University Investment Management Company

Lionel Erdely  
Head and Chief Investment Officer, Alternative Investment Solutions, Investcorp Investment Advisors

Panayiotis Lambropoulos  
Portfolio Manager – Hedge Funds, Employees Retirement System of Texas

Steven Wilson  
Investment Manager, Teacher Retirement System of Texas

9:45-10:30 ***SYSTEMATIC RISK-PREMIA AND FLAT FEE PRODUCTS: OPPORTUNITY OR THREAT FOR MANAGERS?***

Moderator: Remy Marino  
Managing Director, Global Investment Solutions, Deutsche Bank

Panelists: Justin Dew  
Director of Strategic Development, Welton Investment Partners, LLC

Alex Greyserman  
Chief Scientist, ISAM (USA) LLC

Grant Jaffarian  
Portfolio Manager, Crabel Capital Management, LLC

James Medeiros  
Senior Managing Director, Graham Capital Management, L.P.

10:30-11:00 **NETWORKING BREAK**

11:00-11:45 ***TAMING PORTFOLIO RISK WITH MACRO, MANAGED FUTURES & LONG VOL STRATEGIES***

Moderator: Fabien Pavlowski  
Director, Head of U.S. Product Development, Lyxor Asset Management

Panelists: Salem Abraham  
President, Abraham Trading Company

Nancy Davis  
Managing Partner & Chief Investment Officer, Quadratic Capital Management LLC

Jeff Malec  
Managing Director, RCM Alternatives

Chris Stanton  
Chief Investment Officer, Sunrise Capital Management

11:45-12:30

***WHAT INVESTORS NEED NOW FROM MANAGERS***

Moderator: Michael Harris  
President, Campbell & Company

Panelists: James J. Dunn  
Chief Executive Officer & Chief Investment Officer, Verger Capital Management

Bill Enszer  
Director of Investments, Salient Partners

12:30-1:30

**NETWORKING LUNCHEON**

2:00-2:45

***CURRENCIES REDUX: TIME TO INVEST IN FX?***

Moderator: Saul Farber  
Manager, Hedge Funds/Asset Managers, CME Group

Panelists: John Apperson  
Chief Operating Officer, Greenwave Capital Management

Sanjiv Kumar  
Principal, Fort LP

Bill Lipschutz  
Principal, Chief Investment Officer & Head of Portfolio Management, Hathersage Capital Mgmt LLC

2:45-3:30

***THE LONGS & SHORTS OF COMMODITIES INVESTING***

Moderator: Charles Crow  
Partner, Crow & Cushing

Panelists: Jonathan Goldberg  
Chief Investment Officer, BBL Commodities LP

Oliver Kinsey  
Portfolio Manager, Ballymena Advisors LLC

David Martin  
Founder & Managing Member, Martin Fund Management

Tim Rudderow  
Chief Executive Officer & Chief Investment Officer, Mount Lucas

3:30-4:00

**NETWORKING BREAK**

4:00-4:45

***INSTITUTIONAL INVESTORS DISCUSS THEIR APPROACHES TO MANAGED FUTURES & MACRO***

Moderator: Ernest Jaffarian  
Chief Executive Officer & Chief Investment Officer, Efficient Capital Management

Panelists: Herman Laret  
Head of Global Macro/CTA & Multi-strategy, Titan Advisors, LLC

Edward Rzeszowski  
Managing Director, Blackrock Inc.

Arvin Soh  
Portfolio Manager, Alternative Investment Solutions, GAM

Chris Solarz  
Managing Director, Cliffwater LLC

4:45

**RECAP AND CLOSE**

5:00-6:30

**NETWORKING RECEPTION**



# SPEAKER BIOS



## **SALEM ABRAHAM**

Salem Abraham, President, Abraham Trading Company, has been using quantitative models to trade global futures markets for over 25 years. Salem began trading while attending Notre Dame, where he graduated cum laude with a B.B.A. in Finance in 1987. In January of 1988, he began using his systematic approach to trade managed accounts. He registered as a Commodity Trading Advisor in October 1988 and organized Abraham Trading Company in 1990. Salem continues to lead the research efforts at Abraham Trading Company.

Salem has been featured in Michael Covel's books *The Complete Turtle Trader* and *Trend Following*. He has also appeared in *Bloomberg Markets*, *Absolute Return*, *Barron's*, and the *NY Times*. Salem is registered with the Commodity Futures Trading Commission and is a member of the National Futures Association. He held full memberships at both the Chicago Board of Trade and the Chicago Mercantile Exchange.

Salem resides with his family in Canadian, Texas. He is actively involved in improving education in Texas.



## **JOHN APPERSON**

John Apperson is Chief Operating Officer at Austin, Texas based global macro hedge fund, Greenwave Capital Management. His first exposure to alternatives came in college when he interned for Tudor Investment Corp. on the floors of the NY futures exchanges in the late 1980's. After graduating from the University of Georgia, John began his career in futures and FX sales in NY and later London. In 1995, he joined Kingdon Capital Management as a macro trader and two years later was part of the team that launched the global macro hedge fund Two Rivers Capital. For the fifteen years prior to joining Greenwave, John was a fund of funds portfolio manager most recently with Centennial Partners and Meritage Capital. He is a CAIA charter holder.



## **AMY ELEFANTE BEDI**

Amy Elefante Bedi is Director of Hedged Strategies for Washington University Investment Management Company. In this role, she focuses on developing and recommending hedge fund investment strategies and portfolio construction for Washington University's endowment and related assets, which total over \$7 billion. Her responsibilities include sourcing, performing due diligence, and negotiating potential new investments. She also monitors and evaluates WUIMC's existing hedge fund investments. She joined WUIMC in 2008.

Prior to joining WUIMC, Amy was a Vice President at BBR Partners, a multi-family office, from 2004 to 2008, where she was focused on researching hedge funds, private equity, and traditional investments and building portfolios of managers. Before that, she was a Vice President at Morgan Stanley Private Wealth Management and Graystone Partners for eight years, where she responsible for traditional and alternative manager selection as well as managing client relationships. She began her career as a financial analyst focused on international equities at Morningstar.

Amy has an A.B. with honors from The University of Chicago, where she was elected to Phi Beta Kappa. She has held the Chartered Financial Analyst designation since 2001 and is a member of the CFA Institute. She is also a member of the CFA Society of St. Louis and serves on its Program Committee. Amy is a CAIA charterholder.



## **CYRIL BEROIT**

Cyril Beroit is Head of Managed Account and Offshore Distribution at H2O AM LLP. He started his career in Chicago in 1990 trading currency options on the CME for Société Générale group. After spending 4 years in Chicago he moved to France to develop the currency options market making operation on the MATIF. He then moved to SG head office to Head the European currency options market making. After 13 years of trading FX options and futures, Cyril moved to London to become Managing Director and Head of FX European sales and trading for SG. In 2010 he moved to Citibank as a Managing Director in the FX department. Cyril joined H2O AM in 2013 as Managing Director and Head of Managed Accounts and Offshore distribution.



### **CHARLES CROW**

Mr. Crow has over 30 years of experience as an attorney practicing in the area of alternative investments. He is the founding partner of Crow & Cushing, which traces its roots to 1981 when he left a large firm in Newark, New Jersey to start the office in Princeton. Mr. Crow has experience in various aspects of domestic and international law with emphasis on corporate, transactional and finance issues. Throughout his career, he has represented hedge funds and commodity pools and their investment managers.

Mr. Crow has served on the Boards of several prominent hedge funds, funds of funds, both public and private, as well as two mutual funds. Additionally, he was a founding shareholder and Board member of 1st Constitution Bank, Cranbury, New Jersey. He has acted as Chairman of the Board since 2006 and had previously chaired the Audit Committee and the Loan and Investment Committee before becoming Chairman. Mr. Crow's charitable interests include being a member of the Board of Trustees for Centurion Ministries, Inc. in Princeton, New Jersey, a nondenominational non-profit group seeking release of wrongfully convicted persons serving time for crime they did not commit. He also serves as a Trustee of the Antique Boat Museum in Clayton, New York.

Mr. Crow holds a J.D. degree from Seton Hall University, where he was a member of the Law Review. His undergraduate work was done at Hartwick College, Oneonta, New York.



### **NANCY DAVIS**

Ms. Davis founded Quadratic Capital Management in 2013. She is Managing Partner and Chief Investment Officer of the firm. Ms. Davis began her career at Goldman Sachs where she spent ten years, the last seven at the proprietary trading group where she became Head of Credit, Derivatives and OTC Trading. Prior to starting Quadratic, she served as a portfolio manager at Highbridge where she managed \$500 million of capital in a derivatives-only portfolio. She later served in a senior executive role at AllianceBernstein. Ms. Davis writes and speaks frequently about financial topics and world markets. She has been published in Financial News, Absolute Return and Institutional Investor and has contributed papers to two books. She has been interviewed by The Economist, The Financial Times, New York Magazine and Le Figaro. Ms. Davis is a board member of the International Partners Committee and was a keynote speaker in China at the Asset Management Association's annual conference. Ms. Davis has appeared on CNBC, Reuters, Sina, Bloomberg and MSNBC. In 2014, she was selected by Institutional Investor as a Rising Star of Hedge Funds and recognized by The Hedge Fund Journal as one of "Tomorrow's Titans." Ms. Davis holds a B.A. magna cum laude in Economics from George Washington University where she was a recipient of the Presidential Academic Scholarship.



### **JUSTIN DEW**

Mr. Dew joined Welton Investment Partners in 2008. He is a principal of the firm, Director of Strategic Development and head of the New York office. Mr. Dew is responsible for expanding the firm's East Coast presence and identifying, evaluating and executing strategic growth opportunities. He formerly was a Managing Director and Head of Strategic Development for the Clinton Group. Prior to that, he had been Senior Director and Global Head of Alternative Strategies at Standard & Poor's. Mr. Dew holds an MBA from Cornell University and a BS from Ithaca College.



### **JAMES DUNN**

As Verger's Chief Executive and Chief Investment Officer, Jim oversees all investment decisions and is responsible for setting the course for the company, leading our corporate strategy and ensuring that Verger remains competitively positioned to serve our partners' needs in an increasingly complex and volatile market environment.

Previously, Jim was Vice-President and Chief Investment Officer at Wake Forest University, responsible for investment of the University's endowment, working capital and life income assets of over \$1.4 billion. Prior to joining Wake Forest, Jim served as Managing Director at Wilshire Associates Inc., and Chief Investment Officer and Portfolio Manager for Wilshire Funds Management, the money management arm of Wilshire Associates. At Wilshire, Jim was responsible for providing leadership on asset allocation, investment policy and investment manager selection. Jim served as the Chairman of the Wilshire Funds Management Investment Committee and served as Portfolio Manager for all of Wilshire Fund Management's alternative investment portfolios.

In addition to carrying the highest word count of any bio at Verger, Jim holds a BBA in Finance from Villanova University, where he was a member of the NCAA Division I men's varsity soccer team. He is married and the father of two boys.



### **BILL ENSZER**

Bill Enszer is director of investments at Salient, where he oversees the private markets team. Bill and his team lead the firm's efforts on the sourcing, evaluation and due diligence of investments managed by external teams. Bill also serves as the portfolio manager of several multimanager portfolios, including a co-investment strategy.

Prior to joining Salient in 2010, Bill was a vice president of investments and member of the investment committee of a Houston-based wealth management and alternative investments firm. During his five-year tenure, Bill developed and directed their manager research and due diligence processes and assisted in the construction and management of the firm's three fund of hedge funds. Bill started his career at ExxonMobil, where he was a financial analyst and auditor for five years.

Bill earned a Bachelor of Business Administration in finance and economics from Baylor University and an MBA, Beta Gamma Sigma, from Tulane University's A.B. Freeman School of Business.

### **LIONEL ERDELY**

Lionel Erdely is Head and Chief Investment Officer of Alternative Investment Solutions, Investcorp Investment Advisors. He joined Investcorp in 2013. Prior to this, Lionel held the dual position of Chief Investment Officer since 2004 and Chief Executive Officer of Lyxor Inc. since 2009, and previously with its corporate parent Société Générale Group. During his tenure at Lyxor, he was instrumental in expanding the firm's alternative investment business globally, including the Middle East, and growing its roster of large U.S.-based institutional investors. Lionel has his MBA from the École Supérieure des Sciences Économiques et Commerciales (ESSEC) in Paris.

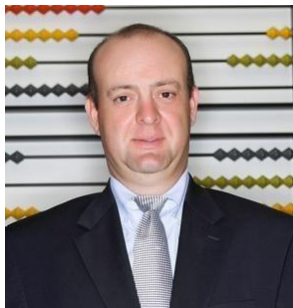
### **SAUL FARBER**

Saul Farber is a manager of client development and sales at the CME Group. Saul moved to New York from Miami, Florida. He completed a BA Cum Laude in political science and history at New York University and proceeded to earn a JD at New York Law School. After briefly practicing law, Saul gained his initial exposure to the financial services industry working for a hedge fund advisory firm in New York. In 2012, Saul joined the CME Group Clearing House where he was responsible for client onboarding throughout the implementation of Dodd Frank and mandatory clearing. Saul is a subject matter expert in cleared OTC Interest Rate and Credit Default Swaps. Most recently Saul joined the client development and sales team in 2015, where he is responsible for covering hedge funds and institutional asset managers. Over the last 18 months Saul has focused his attention on the CTA and managed futures community, working closely with market participants on expanding their use of listed futures and options products and improving ease and efficiency of clearing said products at the exchange. Saul resides in New York City with his wife and 1 year old son.

### **JONATHAN GOLDBERG**

Jonathan Goldberg is the founder and Chief Investment Officer of BBL Commodities, LP ("BBL" or the "Investment Manager"). The Investment Manager seeks to generate positive risk-adjusted returns predominantly via relative value trade opportunities that are uncorrelated to market direction. The Investment Manager trades liquid and listed futures and options with a focus in the petroleum market and a specialty in refined products. Prior to founding the Investment Manager in 2013, Mr. Goldberg worked in Glencore's oil department from 2010 through 2013 where he was responsible for helping to build the firm's US oil derivatives business. Mr. Goldberg managed a proprietary book and leveraged his financial experience as well as his understanding of the physical oil markets. Before joining Glencore as a partner, Mr. Goldberg worked for J. Aron, the commodities division of Goldman Sachs from 2003 to 2010. Mr. Goldberg began his career working with Goldman's refining and end-user clients on structured hedging transactions before taking over a proprietary trading role where he traded across the commodity complex but concentrated on his expertise in oil products. Mr. Goldberg graduated from Yale College with honors with a degree in economics in 2003.





### **ALEX GREYSERMAN**

Alex Greyserman is Chief Scientist and a member of the ISAM Systematic Trend Investment Committee. He has worked with Larry Hite since 1989, initially as Research Director at Mint Investment Management Co. (“Mint”); responsible for research and development of trading strategies and overall portfolio risk management. In 2001, Alex and Larry formed Hite Capital Management, a family office operation in New York, where Alex served as CIO until 2010, when Hite Capital Management merged with ISAM. Alex holds an MS in Electrical Engineering from Columbia University, and an MBA and a Ph.D. in Statistics from Rutgers University. His dissertation focused on empirical data analysis and application of Bayesian statistics to portfolio selection. He also currently serves as visiting Professor in the Graduate Program in Mathematical Finance at Columbia University, teaching various courses and seminars in the field of Quantitative Investment Management. Alex co-authored an all-inclusive guide to trend following, “Trend Following with Managed Futures: The Search for Crisis Alpha”, which was published by Wiley in August 2014.



### **MICHAEL HARRIS**

Mr. Harris joined Campbell & Company in July 2000 and was appointed President in October 2012. Mr. Harris formerly held the positions of Deputy Manager of Trading in 2004, Director of Trading in 2006, and was appointed to the firm’s Investment Committee in March 2010. Mr. Harris was also elected to the Board of Directors in 2012 and has been a member of the firm’s Executive Committee since 2006. He previously worked as a futures and options broker for Refco Inc. (NY) from 1999 to 2000 and within the Sales and Product Development groups at Morgan Stanley Managed Futures from 1997 to 1999. Mr. Harris earned a B.A. with honors in Economics and Japanese Studies from Gettysburg College and also studied abroad at Kansai Gaidai University in Osaka, Japan. He is a regular contributor on a number of financial networks including CNBC, Bloomberg and Fox Business and has been featured in numerous industry publications. Since October 2013, Mr. Harris has served on the Board of Directors of the Managed Funds Association, the leading advocate for sound business practices in the alternative investment industry, and currently serves as Vice Chairman. Mr. Harris also became a member of the Board of Directors of the Foreign Exchange Professionals Association in February 2015.



### **PETER HOOPER**

Peter Hooper is currently Managing Director, Chief Economist for Deutsche Bank Securities in New York. He joined Deutsche Bank Securities in 1999 as Chief US Economist. He became Chief Economist and co-head of global economics in 2006. Prior to joining Deutsche Bank, Hooper enjoyed a distinguished 26-year career at the Federal Reserve Board in Washington, D.C. While rising to senior levels of the Fed staff, he held numerous positions, including as an economist on the FOMC. Hooper and his team produce weekly and quarterly publications for Deutsche Bank with a focus on US and global economic developments and Fed policy; he also comments on US and global economic and financial developments in the news media. Hooper currently serves as a member of the Economic Advisory Panel of the Federal Reserve Bank of New York, a member and former chairman of the Economic Advisory Committee of the American Bankers Association, a founding member of the US Monetary Policy Forum, a member of the Economic Leadership Council for the University of Michigan, and serves on the executive committee of the Forecasters’ Club of New York. Hooper earned a BA in Economics (cum laude) from Princeton University and an MA and Ph.D. in Economics from University of Michigan. He has published numerous books, journal articles, and reviews on economics and policy analysis.



### **GRANT JAFFARIAN**

Grant Jaffarian is Crabel AlphaTerra LLC’s President and Chief Investment Officer. Additionally, Jaffarian serves on Crabel Capital Management’s Executive Committee and holds the title of Crabel Product Specialist. In his role at Crabel Capital, Jaffarian oversees all Crabel initiatives under the AlphaTerra brand. This includes Portfolio Management responsibilities, on-going research involvement, general strategic prioritization and overall oversight. Further, Jaffarian is active on the Crabel Executive team and as a representative for core Crabel products including the flagship Multi-Product. Prior to Crabel/AlphaTerra, Jaffarian spent approximately a decade with Efficient Capital Management, LLC as their Chief Investment Officer. While at Efficient Capital, Jaffarian allocated 2.9 billion USD at peak assets managing the portfolio construction, due diligence and manager selection processes. Before Efficient Capital, Jaffarian founded Petra Intraday, a high-frequency emerging manager. Jaffarian began his career at Belgium based Analytic Investment Management, a high turnover futures manager acquired by Robeco Bank. Mr. Jaffarian has degrees from Wheaton College, IL and an MBA from University of Chicago.



### **ERNEST JAFFARIAN**

Ernest L. Jaffarian is the Founder, and Chief Executive Officer and Chief Investment Officer of Efficient Capital Management, LLC. He is a veteran of over 25 years within the alternative investment industry in the areas of trading, portfolio construction, and risk management. In 1986 he joined Chicago Research & Trading Inc. (CRT) as a member of the proprietary trading group on the floor of the Chicago Board Options Exchange and rose to position of Senior Vice President for OTC Treasury Options. Immediately prior to founding Efficient, Jaffarian was responsible for the managed futures department of Hull Equity Management, LLC and for the allocation of Hull Trading Company, LLC's proprietary capital among trading advisors. Jaffarian is a CAIA® designee and the author of A Survey of the Managed Futures Industry (2007) and the chapter on Managed Futures in CAIA Level II: Advanced Core Topics in Alternative Investments (Wiley & Sons, 2009). Jaffarian is currently on the Board of Directors of the National Futures Association.

Efficient Capital Management, LLC (Efficient) was founded in 1999 by leaders from within the industry's preeminent trading organizations including CRT, Hull Trading, Saliba Partners, and Phillip Securities, Efficient is dedicated to maximizing the unique benefits of cash-efficient "alpha" strategies for the institutional investor. Efficient presently allocates assets for a variety of global private bank, insurance company, funds of funds and private investor clients. It seeks and invests with more than 40 independent trading firms from 8 countries and 4 continents delivering broad diversification in more than 200 markets. Trading is limited to highly liquid and cash-efficient CFTC approved listed futures and options on futures contracts and generic interbank foreign exchange focused on non-directional sources of alpha returns. The market exposures capitalize on opportunities in currencies, interest rates, stock indices, energy, base and precious metals, and commodities. With a staff of over 20, Efficient's significant infrastructure is dedicated to exceeding the most rigorous demands of institutional investors. Available investment structures include private managed accounts and fund structures offering varying levels of capital funding efficiencies.

### **OLIVER KINSEY**

Oliver Kinsey currently serves as the Portfolio Manager of Ballymena Advisors LLC, a specialized soft commodity fund focused on coffee, cocoa, sugar and cotton. He began his career trading cotton for ECOM Agroindustrial Corp in 2001 and spent the next 14 years trading various Agricultural commodities for ECOM, Noble Resources and later Bunge Global Markets. Oliver ran proprietary trading desks at both Noble from 2007-2012 and Bunge from 2012-2013 before joining Ballymena in early 2014. Ballymena's investment philosophy is an actively managed discretionary approach, focusing on bottom up granular fundamental analysis. It utilizes its close ties with ECOM Agroindustrial Corp, a global leader in the physical soft commodity markets, to create and maintain its investment edge. Oliver is a Graduate of the University of Sydney, majoring in Economics and Agricultural Economics

### **SANJIV KUMAR**

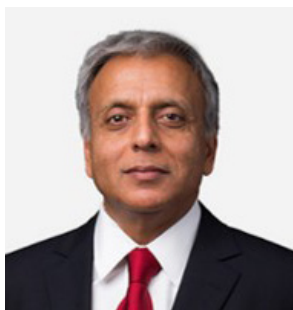
Dr. Sanjiv Kumar, Co-Founder - founded and has been a principal of FORT since 1993. From 1987 to 1992 he was a Senior Manager of Investment at the World Bank.

During his tenure at the World Bank Dr. Kumar managed large fixed-income portfolios in all the major currencies. At the time of his departure Dr. Kumar was responsible for investing a multi-billion dollar portfolio in US and Canadian dollar securities.

From 1985 to 1986 Dr. Kumar was a Vice-President of Free Market Inc., a Chicago-based economic and financial advisory firm for institutional money managers. Dr. Kumar has a Ph.D. in Economics from the University of Chicago and a BA in Mathematics from the University of Delhi.

### **HERMAN LARET**

Herman Laret joined Titan Advisors in 2014. Mr. Laret is head of Titan's Global Macro/CTA Strategies. Prior to joining Titan, he was a Managing Director at Credit Suisse in global macro product sales, and held positions that included co-head of interest rate sales and treasury product manager. Previously, he was on the firm's Proprietary Fund Investment Committee responsible for investing the firm's capital in hedge funds. Mr. Laret spent almost 14 years at Credit Suisse, interrupted by a three year period when he was a partner and senior portfolio manager at MKP Capital, trading G10 rates products, before returning to Credit Suisse in 2005. Mr. Laret began his career in 1990 at Salomon Brothers in London working in M&A before transferring to Salomon's New York office to become a government bond trader. Mr. Laret has a degree in Medicine from Leiden University in the Netherlands.





### **PANAYIOTIS LAMBROPOULOS**

Panayiotis Lambropoulos is a Portfolio Manager of Hedge Funds at the Employees Retirement System of Texas – a \$26 billion retirement plan – located in Austin, Texas. His responsibilities include sourcing, analyzing and evaluating potential hedge fund managers, process and performance assessment, interviewing various fund employees and third-party service providers, and maintaining due diligence efforts.

Panayiotis started in the alternative investment industry as a Research Analyst in Grosvenor Capital Management in Chicago. He later joined MCP Alternative Asset Management, a \$6 billion Tokyo-headquartered Investment Advisor (Fund of Funds) in Chicago. He was responsible for sourcing, analyzing and monitoring hedge fund investments, and contributing to portfolio allocation decisions. He worked alongside institutional clients, all of which were top investment decision makers for some of Japan's best and largest blue chip financial institutions.

Panayiotis holds a B.S in Business Administration with a concentration in Finance and Marketing from Boston College, and an M.B.A in General Management from Northwestern University's Kellogg School of Management. Panayiotis is a CFA Charterholder and has earned his Chartered Alternative Investment Analyst (CAIA) designation as well as his Financial Risk Manager (FRM) certification.



### **BILL LIPSCHUTZ**

Bill Lipschutz is the Principal, CIO and Head of Portfolio Management for Hathersage Capital Management LLC. Hathersage is a global macro investment manager and G10 currency specialist. The firm has extensive experience in both proprietary trading and institutional asset management. Its clients include pension funds, endowments, private banks, fund of funds, family offices and other institutional investors.

Bill has participated widely in the development of both the exchange-traded and over-the-counter foreign exchange option markets. He has held a number of elected and appointed positions in the foreign exchange industry, including as a member of the Board of Governors of the Philadelphia Stock Exchange, as vice chairman of the Foreign Exchange Options Committee of that exchange, as a member of the Ad Hoc Federal Reserve Option Committee, as a member of the Advisory Committee of the Chicago Board Options Exchange and as a Director of the Philadelphia Board of Trade.

Bill Lipschutz is featured in *The New Market Wizards: Conversations with America's Top Traders*, by Jack D. Schwager, 1992 and *The Mind of a Trader: Lessons in Trading Strategy From The World's Leading Traders*, by Alpesh B. Patel, 1998.



### **JEFF MALEC**

Jeff Malec is Managing Director of RCM Alternatives. Mr. Malec has spent 20 years in the futures markets since his days as a clerk in the bond futures pits, and serves as the managing member for multiple commodity based hedge fund products.

Prior to RCM, Mr. Malec was the founder and CEO of Attain Capital Management, which merged with RCM after 13 years assisting clients with alternative investments. He is the great grandson of Harley Davidson founder Walter S. Davidson, and a former board member of the National Futures Association. He holds the Chartered Alternative Investment Association (CAIA) designation, and has authored hundreds of white papers covering alternative investments.



### **DAVID MARTIN**

David Martin is the Founder and Managing Member of Martin Fund Management LLC, focusing on global soft commodities and grains. Mr. Martin has over 25 years of commodities trading experience across multiple commodity groups. He began his career with Cooper Neff and Associates in 1990, and was a full member of the New York Board of Trade, now ICE Futures US. Mr. Martin graduated from the Wharton School of the University of Pennsylvania in Philadelphia. He lives and works in midtown Manhattan.





### **REMY MARINO**

Remy Marino is a senior member of the Global Investment Solutions division at Deutsche Bank Securities in New York. This new division was set-up in 2016 after integration of several key businesses from the asset-management and the investment banking divisions in order to address clients' strategic needs and to deliver holistic solutions across multi asset investment products and solutions.

Mr. Marino joined Deutsche Bank in 2007 as Head of Currency Structuring Americas. In 2009, he was promoted to Head of Alternative Investment Solutions in New York, a senior role which leveraged his technical skills to grow the institutional business in the alternative space, including FX, commodity and Hedge-Fund investments. In 2012, he took responsibility for the distribution of the Alternatives investment offering in asset management division which covered Infrastructure, Hedge-Funds, Fund Derivatives and Alternative Betas, Private Equity, Real Estate and Commodities.

Prior to Deutsche Bank, he ran the currency structuring team at Barclays Capital in New York. Mr. Marino started his career at Credit Agricole as an exotic currency options trader. He held several senior roles at the bank in both New York and Paris, including head of the currency and fixed income structuring team, before moving on to Barclays Capital.

He graduated as an Actuary from the Institute of Financial and Actuarial Sciences in Lyon, France (ISFA) and earned two Master's degrees (Master of Science in Financial Mathematics and an equivalent to a first year of PhD in Econometrics) from Lyon University in 1999/2000.



### **JAMES MEDEIROS**

James A. Medeiros is a Senior Managing Director and an Associated Person of Graham Capital Management ("GCM"), responsible for the firm's Investor Relations group. Mr. Medeiros is also a member of the firm's Investment and Risk committees. Prior to joining GCM in 2009, Mr. Medeiros was a member of the Investor Relations group at Moore Capital Management, L.P. from 2003 to 2009, where he managed relationships with a wide variety of institutional and private clients. Previously, Mr. Medeiros was one of the original employees at Fortress Investment Group, LLC, where he worked from 1998 to 2001 assisting the firm's principals in raising their initial investment funds and managing investor relationships. Mr. Medeiros worked with these same principals from 1996 to 1998 as an employee at BlackRock Capital Finance LP, a former private equity group at BlackRock Inc., and as a member of the Global Principal Finance team at UBS Securities LLC. Mr. Medeiros received a Bachelor of Science from the Edmund A. Walsh School of Foreign Service at Georgetown University in 1996, and received an M.B.A. from the Wharton School at the University of Pennsylvania in 2003.



### **FABIEN PAVLOWSKI**

Fabien Pavlowski joined Lyxor Inc. in September 2010 as the Head of Global Macro and CTA Strategies. Since January 2015, he has served as the Head of U.S. Product Development. From 2002 to 2010, he worked for fund-of-funds Financial Risk Management ("FRM"), both in New York and London. While at FRM, Mr. Pavlowski headed the directional trading sector and was responsible for manager selection of global macro and CTA funds, as well as portfolio management for sector-specific fund-of-funds. Mr. Pavlowski holds a M.Sc. from the Ecole Centrale Paris in France with a major in Computer Science and a minor in Finance.



### **TIM RUDDEROW**

Tim co-founded Mount Lucas in 1986 and is the firm's chief executive officer, overseeing all of its activities, as well as its chief investment officer. He has been in the investment business since the late 1970s, when he worked at Commodities Corporation with the late Frank Vannerson, another co-founder of Mount Lucas. Tim specializes in the design and management of technical trading systems applied to the futures, equity, and fixed income markets. He holds a B.A. in Mathematics from Rutgers University and an M.B.A. in Management Analysis from Drexel University.



### **EDWARD RZESZOWSKI**

Edward Rzeszowski, Managing Director, is a member of BlackRock Alternative Advisors (BAA), the firm's Hedge Fund Solutions team. Mr. Rzeszowski is a member of the Absolute Return Strategies Manager Research group within BAA and is a member of the BAA Management Committee. He is also a portfolio manager and is responsible for the sourcing, evaluating and monitoring of hedge fund managers.

Mr. Rzeszowski's service with the firm dates back to 1995, including his time with Merrill Lynch Investment Managers (MLIM), which merged with BlackRock in 2006. At MLIM, Mr. Rzeszowski was a Senior Hedge Fund Analyst and Portfolio Manager. Prior to joining MLIM in 1995, Mr. Rzeszowski was responsible for the consolidation of managed futures risks at OMR Systems Corporation.

Mr. Rzeszowski earned a BA degree in economics and finance from the University of Pittsburgh.





### **ARVIN SOH**

Arvin Soh is a Portfolio Manager and Investment Committee Member of GAM's Global Investment Solutions team with over twenty years of experience investing professionally. Within GAM, he is responsible for global macro and systematic investments along with the management of GAM Trading and numerous multi-strategy accounts. This also includes collaborating with the global sales and marketing team on new product development. Prior to joining GAM in February 2005, Mr Soh was a manager within the pension group at Pfizer, with primary responsibility for manager selection in international equity, global macro and currency funds. Before that, he was an assistant portfolio manager with a quantitatively-based fundamental hedge fund, and a vice president with Bankers Trust Asset Management focused on global markets. Mr Soh holds a BA in Economics from Cornell University and an MBA from the Wharton School of the University of Pennsylvania. He is based in New York.



### **CHRIS SOLARZ**

Chris is a Managing Director of Cliffwater LLC in our New York office and a member of the hedge fund research team. Prior to joining Cliffwater in 2011, Chris was a Senior Analyst at SAIL Advisors, where he focused on manager selection and due diligence as Head of Research for tactical trading and relative value strategies. Previous experience includes working for ING Investment Management, Antarctica Asset Management, Societe Generale Barr Devlin, and CIBC World Markets.

He earned a BA in Economics and Anthropology from the University of Pennsylvania and a MComm in Finance from the University of New South Wales, where he was a Federation Scholar. Chris is a Certified Public Accountant, holds the Chartered Alternative Investment Analyst® designation, the Chartered Financial Analyst® designation, and is a member of the New York Society of Security Analysts. Chris has broken 6 Guinness World Records and has run marathons on all 7 continents and in all 50 US states.



### **CHRIS STANTON**

Chris Stanton is the CIO of Sunrise Capital Partners, a pioneering macro investment firm that manages over \$700 million (as of September 1, 2016). In his role, Stanton oversees the implementation of all Sunrise investment programs and has co-developed many aspects of those programs with Sunrise's research and development team. Prior to joining Sunrise, Stanton traded extensively in a wide range of global commodity and currency markets as Vice President and Portfolio Manager for Deerhurst Capital Management and as Capital Markets Officer for JP Morgan. In those roles, Stanton managed multi-million dollar portfolios and conducted all market and fundamental risk analysis for those portfolios. Stanton holds a J.D. cum laude from the Northwestern University School of Law, has engaged in graduate studies at Northwestern's Kellogg School of Management, and earned a Bachelor of Science in Engineering and Applied Mathematics from Lehigh University.



### **STEVEN WILSON**

Steven Wilson is a Portfolio Manager in the External Public Markets group at the Teacher Retirement System of Texas, a \$130 billion pension system serving 1.5 million active and retired educators and their families. Mr. Wilson works across the \$35 billion Hedge Fund and Long Oriented Equity allocations, with primary coverage in Managed Futures, Reinsurance and Emerging Markets strategies. Mr. Wilson received an MBA from the Rice University Jones School of Business, is a graduate of the University of Texas at Austin McCombs School of Business, and holds the CAIA designation.

# CONFERENCE ATTENDEES

## AS OF OCTOBER 27, 2016

Bernard Abdo  
Deutsche Bank Securities  
New York, NY

Chris Aberle  
Director of Corporate Sales  
and Marketing  
INTL FCStone Financial Inc  
Miami, FL

Katherine A. Abraham  
Director of Marketing  
Abraham Trading Company  
Canadian, TX

Salem Abraham  
President  
Abraham Trading Company  
Canadian, TX

Mark Adams  
Assistant Portfolio Manager  
Warrington Asset Management LLC  
Dallas, TX

Mike Ahern  
Donnelly Partners Investments  
Houston, TX

Saurav Aneja  
Assistant Vice President Global Client  
Group – Alternatives  
Deutsche Bank Securities  
New York, NY

John Apperson  
Chief Operating Officer  
Greenwave Capital Management  
Austin, TX

Bruce Aulie  
Director of Manager Search  
Efficient Capital Management, LLC  
Warrenville, IL

Brennan Basnicki  
Product Specialist, Director of  
Consultant Relations  
Campbell & Company, Inc.  
Baltimore, MD

Derek Bergquist  
Manager - Hedge Funds  
Texas County & District  
Retirement System  
Austin, TX

Cyril Beriot  
Managing Director  
H2O AM  
London United Kingdom

Colby Borders  
Manager, Managed Futures  
Marketing  
CME Group  
Chicago, IL

Michael Boss  
Director – Capital Introductions  
Societe Generale  
Chicago, IL

Matthew Bradbard  
Director of Alternatives  
RCM Alternatives  
Chicago, IL

Jan-Paul Bruynes  
Partner  
Akin Gump Strauss Hauer and Feld  
New York, NY

Keith Byers  
Managing Director Business  
Development  
Aventis Asset Management, LLC  
Buffalo Grove, IL

Ryan Carling, CPA, MSF  
Director - Tax  
Arthur Bell  
Hunt Valley, MD

TJ Carlson  
Chief Investment Officer  
Texas Municipal Retirement System  
Austin, TX

Sladja Carton  
Global Head of Strategic  
Development  
Mizuho Alternative Investments, LLC  
New York, NY

Tom Chavez  
RCM Alternatives  
Chicago, IL

# CONFERENCE ATTENDEES

## AS OF OCTOBER 27, 2016

Hayley Cohen  
Director of Investor Relations  
R.G. Niederhoffer Capital  
Management  
New York, NY

Braden Cole  
Senior Analyst  
RGT Wealth Advisors  
Dallas, TX

Charles S. Crow  
Partner  
Crow & Cushing  
Princeton, NJ

John Cummings  
Director of Research  
RCM Alternatives  
Chicago, IL

James Curley  
Executive Vice President  
Dunn Capital Management, LLC  
Stuart, FL

Andrew Dabinett  
Managing Director  
Head of Business Development,  
North America  
Lyxor Asset Management, Inc.  
New York, NY

Mark Daniels  
Managing Director  
UBS Securities, LLC  
New York, NY

Nancy Davis  
CIO & Managing Partner  
Quadratic Capital Management LLC  
Greenwich, CT

Eddie Deschappelles  
Managing Director  
Aspect Capital Inc  
Stamford, CT

Justin Dew  
Director of Strategic Development  
Welton Investment Partners, LLC  
Carmel, CA

Brian Donnelly  
CEO  
Donnelly Partners Investments  
Houston, TX

Eric Donovan  
Vice President  
J.P. Morgan  
New York, NY

Kevin Doyle  
Portfolio Manger  
eco Capital Management  
Kewaskum, WI

Jim Dunn  
CEO & CIO  
Verger Capital Management  
Winston-Salem, NC

Ken Dunn  
SVP Investments-Financial Advisor  
RBC Wealth Management  
Tyler, TX

Eric Eiers  
Institutional Prime Services  
ADM Investor Services, Inc  
Chicago, IL

Jeff Eizenberg  
Executive Director  
RCM Alternatives  
Chicago, IL

Nigel Ekern  
Fund Manager  
Eclipse Capital Management, Inc.  
Rowayton, CT

Amy Elefante Bedi  
Director of Hedged Strategies  
Washington University Investment  
Management Company  
St Louis, MO

Bill Enszer  
Director of Investments  
Salient Partners, L.P.  
Houston, TX

Ian Enverga  
Director  
QMS Capital Management  
Durham, NC

# CONFERENCE ATTENDEES

**AS OF OCTOBER 27, 2016**

Lionel Erdely  
Head & Chief Investment Officer,  
Alternative Investment Solutions  
Investcorp Investment Advisors  
New York, NY

Eduardo L. Esteve  
Managing Director  
ECOM Agroindustrial Corporation Ltd.  
Dallas, TX

Saul Farber  
Manager, Client Development and  
Sales, Hedge Funds/Asset Managers  
CME Group  
New York, NY

Gregory Fomin  
Chief Operating Officer  
Warrington Asset Management LLC  
Dallas, TX

Audrey Gale  
Principal  
Eckhardt Trading Company  
Chicago, IL

Michael Geismar  
President  
Quantitative Investment  
Management  
Charlottesville, VA

Jason Gerlach  
CEO and Managing Partner  
Sunrise Capital Partners, LLC  
Carlsbad, CA

Lee Gladden  
Chief Executive Officer  
Witherspoon Asset Management  
Princeton, NJ

Michael L. Going  
Associate Director of Business  
Development  
Efficient Capital Management  
Warrenville, IL

Jonathan Goldberg  
Chief Investment Officer  
BBL Commodities LP  
New York, NY

David Goracy  
Partner Managing Director  
Ramius LLC  
New York, NY

Alex Greyserman  
Chief Scientist  
ISAM  
Boca Raton, FL

Kelly Griffin  
Head of Investor Relations  
Caxton Associates  
New York, NY

Olaf Gurk  
Director - Institutional Sales  
SGCIB  
New York, NY

Joel Handy  
Director of Client Relations  
Efficient Capital Management, LLC  
Warrenville, IL

Neale Hanover  
Partner  
Engelhart Commodities Trading  
Partners (ECTP)  
Stamford, CT

Michael Harris  
President  
Campbell & Company, Inc.  
Baltimore, MD

Colleen Hedges  
Associate  
Westrock Asset Management  
Little Rock, AR

Andrew Higginson  
Director - Institutional Sales  
GAM  
New York, NY

Joel Hinkhouse  
Senior Portfolio Manager  
Teacher Retirement System of Texas  
Austin, TX

Peter Hooper  
Managing Director, Chief Economist  
Deutsche Bank Securities  
New York, NY



# CONFERENCE ATTENDEES

**AS OF OCTOBER 27, 2016**

Kristin Hovencamp  
Director, Institutional Sales  
GAM  
New York, NY

Neal Howe  
Director of Investor Solutions  
Welton Investment Partners  
New York, NY

Raj Idnani  
Managing Member  
Blueprint Capital Management LLC  
Austin, TX

Kevin Jacobs  
Senior Trader  
R.G. Niederhoffer Capital  
Management  
New York, NY

Timothy Jacobson  
Managing Partner  
Pearl Capital Advisors, LLC  
San Francisco, CA

Ernest Jaffarian  
Chief Executive Officer & Chief  
Investment Officer  
Efficient Capital Management, LLC  
Warrenville, IL

Grant Jaffarian  
Portfolio Manager  
Crabel Capital Management, LLC  
Los Angeles, CA

Jeffrey Jaro  
Investment Officer  
California State Teachers' Retirement  
System  
West Sacramento, CA

Parker Johnson  
Managing Director  
Ramius LLC  
New York, NY

Shaun Jordan  
Managing Director  
Thales Trading Solutions LLC  
Austin, TX

Brian Julian  
Blueprint Capital Management LLC  
Austin, TX

Niels Kaastrup-Larsen  
Managing Director  
Dunn Capital Europe  
Zug Switzerland

Ciaran Kane  
Portfolio Manager  
Three Rock Capital Management  
Dublin Ireland

Bryan Kiernan  
CDO  
Emil van Essen LLC  
Chicago, IL USA

Oliver Kinsey  
Portfolio Manager  
Ballymena Advisors LLC  
New York, NY USA

Timothy Kirk  
Portfolio Manager  
Revolution Capital Management  
Denver, CO

James Koutoulas  
CEO  
Typhon Capital Management  
Chicago, IL

Sanjiv Kumar  
Principal  
Fort LP  
Chevy Chase, MD

Panayiotis Lambropoulos  
Portfolio Manager  
Employees Retirement System of  
Texas  
Austin, TX

Herman Laret  
Head of Global Macro/CTA & Multi-  
strategy  
Titan Advisors, LLC  
Stamford, CT

Richard Leahy  
Principal  
Episteme Capital Partners (US), LLC  
Rye Brook, NY

# CONFERENCE ATTENDEES

## AS OF OCTOBER 27, 2016

Patrick Lee  
Regional Director  
Natixis  
Dallas, TX

Harry Levitt  
Managing Director  
Mack Financial Group, Inc.  
Pacific Palisades, CA

Tina Lewandowski  
Chief Marketing Officer  
Arthur Bell  
Hunt Valley, MD

Rob Lingle  
Managing Director  
Capital Growth Securities  
Newport Beach, CA

Bill Lipschutz  
Principal, CIO and Head of Portfolio  
Management  
Hathersage Capital Management LLC  
New York, NY

Matt Logan  
Managing Director  
The Private Bank  
Chicago, IL

Alistair MacNaughton  
Chief Legal Officer  
Mulvaney Capital Management Ltd.  
London United Kingdom

Jeff Malec  
Managing Director  
RCM Alternatives  
Chicago, IL

Ashish Malhotra  
Senior Managing Director  
Crow Holdings Capital - Investment  
Partners  
Dallas, TX

Remy Marino  
Managing Director Head of  
Alternative Investment, Americas  
Deutsche Bank Securities  
New York, NY

Ryan Marsh  
Texas County & District Retirement  
System  
Austin, TX

David Martin  
Founder and Managing Member  
Martin Fund Management LLC  
New York, NY

John Martin  
Meritage Capital, LLC  
Austin, TX

Lisa Martin  
Director of Sales & Marketing  
Crabel Capital Management, LLC  
Los Angeles, CA

Brent Matush  
Client Portfolio Manager  
AlphaSimplex  
Cambridge, MA

James Medeiros  
Senior Managing Director  
Graham Capital Management, L.P.  
Rowayton, CT

John Melvin  
Guest of Abraham Trading Company  
Canadian, TX

Monique Miller  
Managing Director  
Wilshire Associates  
Santa Monica, CA

Russell Newbury  
Texas County & District Retirement  
System  
Austin, TX

Ned Parrish  
Managing Director  
QIM  
Charlottesville, VA

Neil Patel, CFA  
Institutional Consulting Analyst  
Graystone Consulting - Austin  
Austin, TX

# CONFERENCE ATTENDEES

**AS OF OCTOBER 27, 2016**

Fabien Pavlowsky  
Director, Head of U.S. Product  
Development  
Lyxor Asset Management, Inc.  
New York, NY

Harold E. Peterson  
Managing Principal  
Castle Hill Advisors, LLC  
Austin, TX

Garrett Pittman  
Portfolio Manager  
TCG Advisors  
Austin, TX

Vijay Popat  
Deutsche Bank Securities  
New York, NY

Adam Price  
Director  
Meritage Capital, LLC  
Austin, TX

Norma Richmond  
Manager of Audit, Assurance and  
Advisory  
Arthur Bell  
Hunt Valley, MD

Paul Rieger  
RCM Alternatives  
Chicago, IL

Edouard Robbes  
Head of Business Development  
Thales Trading Solutions LLC  
New York, NY

Charles Robinson  
Managing Member  
Bensboro Advisors, LLC  
San Antonio, TX

Tim Rudderow  
CEO and CIO  
Mount Lucas Management LP  
Newtown, PA

John Ryan  
Founder  
Spring Valley Asset Management  
Morristown, NJ

Edward Rzeszowski  
Managing Director  
Blackrock  
New York, NY

Carol Salaiz  
Global Strategic Director  
ECOM Agroindustrial Corporation Ltd.  
Dallas, TX

Michael Schifman  
LME Metals  
INTL FCStone Inc  
New York, NY

Andy Schneider  
Director, Business Development  
North America  
ISAM (USA) Inc  
Boca Raton, FL

Anna Shlimak  
Director of Investor Relations  
Quest Partners LLC  
New York, NY

Barry Sims  
Director of Operations  
Abraham Trading Company  
Canadian, TX

Siddhartha Sinha  
Deutsche Bank Securities  
New York, NY

Alex Smith  
Meritage Capital, LLC  
Austin, TX

Arvin Soh  
Portfolio Manager  
GAM  
New York, NY

Chris Solarz  
Managing Director  
Cliffwater LLC  
New York, NY

# CONFERENCE ATTENDEES

## AS OF OCTOBER 27, 2016

Rob Sorrentino  
Eckhardt Trading Company  
Chicago, IL

Chris Stanton  
CIO  
Sunrise Capital Partners, LLC  
Carlsbad, CA

Jon Stein  
CEO  
Kettera Strategies  
Chicago, IL

Frank Stone  
Director, Custom Strategies  
Titan Advisors  
Stamford, CT

Nelson Timpson  
Research Analyst  
AC Investment Management  
New York, NY

Steven Tong  
Director of Innovation and Risk  
California State Teachers' Retirement  
System  
West Sacramento, CA

Mark Tower  
Director, Business Development  
Lyxor Asset Management, Inc.  
New York, NY

Emil van Essen  
CEO & CIO  
Emil van Essen LLC  
Chicago, IL

Joe S. Wade  
Chief Investment Officer  
Meritage Capital, LLC  
Austin, TX

Sol Waksman  
President  
Barclay Hedge, Ltd  
Fairfield, IA

Patrick Watson  
President  
Watson Capital Advisors  
New York, NY

Mark Whidby  
CIO  
Lee Financial Corporation  
Dallas, TX

Joe Wicklander  
Managing Director  
The Private Bank  
Chicago, IL

Steven Wilson  
Investment Manager  
Teacher Retirement System of Texas  
Austin, TX

Mike Wooten  
AVP Business Development  
The Gemini Companies  
Omaha, NE

Tariq Zahir  
Managing Member  
Tyche Capital Advisors LLC  
Mineola, NY



# CONFERENCE LOCATION



OMNI AUSTIN HOTEL DOWNTOWN  
700 SAN JACINTO AT 8TH STREET  
AUSTIN, TEXAS 78701  
(512) 476-3700

Meg Bode  
MBode@TalkingHedgeEvents.com  
516-627-2987

Kristin Fox  
KFox@TalkingHedgeEvents.com  
708-267-2584

[www.TalkingHedgeEvents.com](http://www.TalkingHedgeEvents.com)