

# Where Can Indexing Take You in 2017's Second Half?

**DATE:** Thursday, July 13, 2017

**TIME:** 12:00 PM – 4:00 PM

**LOCATION:** Omni Hotel  
500 California Street  
San Francisco, CA 94104

**11:30 AM – 12:00 PM      REGISTRATION & LUNCH**

**12:00 PM – 12:10 PM      WELCOME & INTRODUCTION**

**Travis Robinson**, Financial Advisor Channel Management, S&P Dow Jones Indices

**12:10 PM – 12:30 PM      INNOVATIONS IN WATER AND GREEN BOND INVESTING**

**Lauren Smart**, Global Head Financial Institutions Business,  
Trucost, a part of S&P Dow Jones Indices

**12:30 PM – 1:10 PM      GLOBAL PORTFOLIOS WITH DYNAMIC RISK CONTROLS**

**Moderator: William Belden**, Managing Director, Head of ETF Business Development,  
Guggenheim Investments

**Panelists:**

- **Philip Dodson**, CIMA, Managing Director, Tactical Associates/Merrill Lynch–Private Banking and Investment Group
- **Preston Paine**, Financial Advisor, Senior Vice President, Portfolio Manager, Morgan Stanley Wealth Management
- **Adam Schenck**, CFA, Managing Director, Head of Portfolio Management, Milliman
- **Randy Swan**, President and Portfolio Manager, Swan Global Investments

**1:10 PM – 1:40 PM            OUTLOOK FOR THE SECOND HALF OF 2017**

**Sam Stovall**, Chief Investment Strategist, CFRA

**1:40 PM – 2:00 PM            NETWORKING BREAK**

**2:00 PM – 2:30 PM            THE RISE OF FACTORS**

**Moderator: Tom Lydon**, Editor and Publisher, ETF Trends

- **Nick Kalivas**, Senior Equity Product Strategist, PowerShares by Invesco
- **Craig Lazzara**, CFA, Managing Director and Global Head of Index Investment Strategy, S&P Dow Jones Indices

**2:30 PM – 3:15 PM            PRACTICAL ASPECTS OF PAIRING FACTORS IN PORTFOLIOS**

**Moderator: Tom Lydon**, Editor and Publisher, ETF Trends

**Panelists:**

- **Meb Faber**, Co-founder & Chief Investment Officer, Cambria Investment Management
- **King Lip**, CFA, Chief Strategist, Baker Avenue Wealth Management
- **Brian Lockhart**, Chief Investment Officer, Peak Capital Management
- **Rob Mooney**, Portfolio Manager, The Omega Group

**3:15 PM – 3:25 PM            ADVISORS WHO HAVE GROWN THEIR PRACTICE WITH CUSTOM INDEXING**

- **Joe Mallen**, Helios Quantitative Research
- **Michael Mell**, Director, Custom Indices, S&P Dow Jones Indices

**3:25 PM – 4:00 PM            POLITICS & U.S. MARKETS**

**John Mauldin**, CEO, Mauldin Economics

**4:00 PM – 5:00 PM            COCKTAIL RECEPTION**