



# 2016 ANNUAL ACPM CONFERENCE – AGENDA

SUNDAY, SEPTEMBER 25

5:30 – 8:30pm	Conference arrivals, check-in, and dinner
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## MONDAY, SEPTEMBER 26

TIME	ITEM	SPEAKER	LOCATION	SPONSORED BY
7:45 – 8:00	Conference Kick – Off + Opening Remarks	Michael Ross, ACPM Board President	Briarcliff	
8:00 – 8:45	Global Macro Update	Dr. Richard Clarida	Briarcliff	<b>PIMCO</b>
8:45 – 10:15	Keynote Presentation (Part I): The Vanishing Moat: Are Business Franchises Able to Survive the Age of Disruption?	Dr. Tano Santos, Columbia University	Briarcliff	
10:15 – 10:30	Break			
10:30 – 11:30	Keynote Presentation (Part II): Continuation of “The Vanishing Moat”	Dr. Tano Santos, Columbia University	Briarcliff	
11:30 – 12:15	Panel Discussion: Portfolio Tools	ACPM Ambassadors + Board of Directors	Briarcliff	
12:15 – 1:00	Lunch		Atrium	
1:00 – 2:00	Special Addition: How to Think About Risk	Howard Marks, CFA, Oaktree Capital	Briarcliff	
2:00 – 2:45	Technical Market Update	Fred Meissner, CMT, The FRED Report	Briarcliff	<b>powerSHARES</b> 
2:45 – 3:00	Break			
3:00 – 3:45	Breakout Sessions (Select one): <ul style="list-style-type: none"> <li>▪ Definable, Repeatable, Scalable</li> <li>▪ Top Advisor Trends</li> </ul>	Daniel Gallagher, Process for Growth Sterling Shea, Barrons	Hawthorne Briarcliff	<b>STATE STREET</b> <b>GLOBAL ADVISORS</b> <b>SPDR</b>
3:45 – 4:30	Panel Discussion: Practice Management	ACPM Ambassadors + Board of Directors	Briarcliff	
4:30 – 5:30	Breakout Sessions (Select one) <ul style="list-style-type: none"> <li>▪ ACPM Annual Membership Meeting</li> <li>▪ Portfolio Tools: Definable, Repeatable, Scalable (repeat)</li> </ul>	ACPM Board of Directors Daniel Gallagher, Process for Growth	Hawthorne Briarcliff	
5:30 – 7:30	Presentation of Founder’s Award + Dinner		Hudson	



ACADEMY of CERTIFIED PORTFOLIO MANAGERS

# 2016 ANNUAL ACPM CONFERENCE – AGENDA

TUESDAY, SEPTEMBER 27

TIME	ITEM	SPEAKER	LOCATION	SPONSORED BY
8:00 – 8:45	<b>Momentum Investing</b>	Ben Jones, Dorsey, Wright & Associates	Briarcliff	
8:45 – 9:30	<b>Secular Outlook and Investment Implications</b>	Tony Crescenzi, PIMCO	Briarcliff	
9:30 – 10:15	<b>Opportunities and Developments in the U.S. Speculative Grade Markets</b>	Mike Anderson, GSO	Briarcliff	
10:15 – 10:30	<b>Break</b>			
10:30 – 11:15	<b>Breakout Sessions (Select one)</b> <ul style="list-style-type: none"> <li>▪ <b>Trader’s Perspective</b></li> <li>▪ <b>Corporate Bonds: What Issuers are Attractive Today?</b></li> </ul>	Laszlo Birinyi, Birinyi Associates Erin Lyons, CreditSights	Hawthorne Briarcliff	
11:15 – 12:00	<b>Panel Discussion: Marketing</b>	ACPM Ambassadors + Board of Directors	Briarcliff	
12:00 – 12:15	<b>Closing Remarks</b>	Michael Ross, ACPM Board President	Briarcliff	
12:15	<b>Lunch + Departure</b>		Atrium	

<b>DATE</b>	September 25 – 27, 2016	<b>CONTACT</b>	<b>SPONSORS</b>
<b>LOCATION</b>	Doral Arrowwood Rye Brook, New York	Ruth Blidar P   212.854.8404 E   ruth.blidar@academyofcpm.org W   www.academyofcpm.org	
<b>COST</b>	<b>CPM® Members:</b> <ul style="list-style-type: none"> <li>▪ Accommodations: \$1199</li> <li>▪ Conference Only: \$679</li> </ul> <b>Non - CPM®</b> <ul style="list-style-type: none"> <li>▪ Accommodations: \$1499</li> <li>▪ Conference Only: \$899</li> </ul>	<b>This conference meets the requirements for all ACPM continuing education hours for 2016.</b>	 