

2019 DeMarche Client Conference

Reality Check: Change, Challenges and Opportunities

September 25 – 27, 2019



There's one clear message coming out of today's head-spinning financial headlines – it's time for a Reality Check. Don't sit idle and allow the markets to dictate the success or failure of your investment program. Informed action is the best strategy to avoid getting caught off guard in changing times.

Join us in Kansas City on September 25-27 for the 2019 Annual DeMarche Client Conference - Reality Check: Change, Challenges and Opportunities. Together, we will explore the critical issues facing investors today and help everyone to take that honest look at whether their investment portfolios are prepared for what markets may have in store. Maximize the value of your relationship with DeMarche and attend our premier educational and networking event.

Speakers



Tim Marchesi, CFA
DeMarche



James Dykstal, CFA
DeMarche



Evan Brown, CFA
UBS Asset Management



Ryan Taliaferro, Ph.D.
Acadian Asset Management



Coleen Trimble
DeMarche



Tom Woolwine
DeMarche



Jake Gilliam, CFA
Charles Schwab



Jennifer Jackson
Partners Group



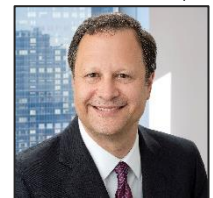
Travis Newman
DeMarche



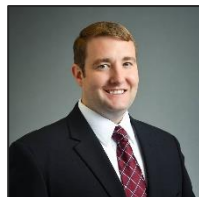
Donald Lennard
DeMarche



John Hartwell Cocke, CFA
Corbin Capital Partners



Michael Granoff
Pomona Capital



Mark Andes
DeMarche



Peg VanWagoner
DeMarche



Carolyn Arida
Harrison Street



Brian Fontanella, CFA
Diamond Hill



Guilherme Valle, CFA
ABS Investment
Management



Tim Paulson
Lord Abbett

Register Online

<http://client.news/demarche9>

Venue Information

Hilton President Hotel
1329 Baltimore Ave
Kansas City, MO 64105

Hotel Reservation Center

1.800.HILTONS
Identify yourself with
DeMarche Client Conference.

Or reserve your rooms online
at: [http://group.hilton.com/
DeMarcheClientConf](http://group.hilton.com/DeMarcheClientConf)

Event Contact

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Sally Miscek
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2019 DeMarche Client Conference

Reality Check: Change, Challenges and Opportunities

Presentation Agenda

Thursday, September 26, 2019

Welcome

DeMarche Update

Timothy Marchesi, CFA – DeMarche

Session I: Strategic Horizon for Global Markets

Strategic Horizon – What it is and Why it Matters!

James Dykstal, CFA – DeMarche

Macroeconomic Outlook

Evan Brown, CFA – UBS Asset Management

Psychology & Risk in Equity Markets

Ryan Taliaferro, Ph.D., Director Equity Strategies –
Acadian Asset Management

Retirement Plan Best Practices

Coleen Trimble – DeMarche

Tom Woolwine – DeMarche

Target Date Outlook

Jake Gilliam, CFA – Charles Schwab

Session II: Finding Opportunities in Alternatives

Alternative Issues

Travis Newman – DeMarche

Private Equity Implementation and Vehicles

Jennifer Jackson – Partners Group

Utilizing Private Equity Secondaries

Michael Granoff, Founder & CEO – Pomona Capital

Private Credit

John Hartwell Cocke, CFA – Corbin Capital Management

Real Estate Infrastructure

Carolyn Arida – Harrison Street Investments

Recap and Closing Comments

Don Lennard – DeMarche

Friday, September 27, 2019

Welcome Back

Framing SRI and ESG Investment Policies

Peg VanWagoner – DeMarche

Session III: Staying Traditional

Importance of Traditional Asset Classes

Mark Andes – DeMarche

Value Equities

Brian Fontanella, CFA – Diamond Hill Investment
Management

Emerging Markets – Continued Opportunities

Guilherme Ribeiro do Valle, CFA – ABS Investment
Management

**Investing in Public Fixed Income in Today's
Market**

Tim Paulson – Lord, Abbett & Co.

Reflections into Realities

Peg VanWagoner – DeMarche

Closing Comments

Tom Woolwine – DeMarche