



STRATEGAS

Fifth Annual Strategas Investment Forum

Rosewood, Bermuda

Thursday, October 4, 2018 - Sunday, October 7, 2018



Sebastian Junger

Award-Winning Journalist,
Director, and Best-Selling
Author



Nicholas Bohnsack

Head of Quantitative
Research,
Strategas



Dan Clifton

Head of Policy Research,
Strategas



Jason DeSena Trennert

Chief Investment Strategist,
Strategas



Don Rissmiller

Chief Economist,
Strategas



Chris Verrone

Head of Technical Analysis,
Strategas

Thursday, October 4, 2018

06:30 PM to 09:30 PM

Rosewood - Pergola Terrace

Welcome Reception

Cocktails and island fare will be served.

Friday, October 5, 2018

07:30 AM to 07:30 AM

Rosewood - Soncy/Chelston Rooms

Breakfast

08:00 AM to 10:30 AM

Investment Roundtable Session I

10:45 AM to 11:45 AM

Trump, Taxes, Tariffs, and the 2018 Midterm Elections

- **Don Rissmiller**

Chief Economist,
Strategas

- **Dan Clifton**

Head of Policy Research,
Strategas

12:00 PM to 12:00 PM

Various Locations

Group Recreations

Golf, Sailing or group lunch with Don Rissmiller available.

06:45 PM to 09:00 PM

Croquet Lawn - Rosewood

An Evening with Sebastian Junger

- **Sebastian Junger**

Award-Winning Journalist, Director, and Best-Selling Author



Saturday, October 6, 2018

07:30 AM to 07:30 AM

Breakfast

Rosewood - Soncy/Chelston Rooms

08:00 AM to 09:00 AM

Defying the Consensus... Bull Market & Economic Cycle Not Over Yet

• **Chris Verrone**

Head of Technical Analysis,
Strategas

• **Jason DeSena Trennert**

Chief Investment Strategist,
Strategas

• **Nicholas Bohnsack**

Head of Quantitative Research,
Strategas

09:15 AM to 11:45 AM

Investment Roundtable Session II

12:00 PM to 01:00 PM

Roundtable Lunch; What Does the Investment Business Look Like in 10 Years?

02:00 PM to 02:00 PM

Afternoon Recreations

Rosewood

06:30 PM to 09:30 PM

Social Cocktails and Dinner

Rosewood Beach Club

Sunday, October 7, 2018

08:00 AM to 08:00 AM

Departure

Rosewood

SPEAKERS



Sebastian Junger

Award-Winning Journalist, Director, and Best-Selling Author

Sebastian Junger is the internationally acclaimed, best-selling author of [WAR](#), [The Perfect Storm](#), [A Death in Belmont](#) and [Fire](#). He is also the acclaimed director of the documentary films [Restrepo](#) and [Korengal](#). As a contributing editor to *Vanity Fair* and as a contributor to ABC News, he has covered major international news stories and has been awarded the National Magazine Award and a SAIS Novartis Prize for Journalism.

Junger's newest book entitled [Tribe: On Homecoming and Belonging](#), takes readers on an investigation of the experiences of veterans and proposes that a major cause of pain is not being at war but coming home. We all have a strong instinct to belong to small groups defined by clear purpose and understanding – "tribes." In [Tribe](#), Junger demonstrates how this tribal connection has been largely lost in modern society. He examines PTSD as a side effect of soldiers leaving the close bonds they've formed in their military platoons and returning to a disconnected modern society and argues that regaining a sense of closeness may be the key to our psychological survival.

Junger's critically acclaimed documentary [Restrepo](#), co-directed with photojournalist Tim Hetherington, was nominated for an Academy Award for Best Documentary and received the 2010 Grand Jury Prize at the Sundance Film Festival. [Restrepo](#) documents the war in Afghanistan by reporting from soldiers' perspectives. Its massive success inspired Junger to produce [Korengal](#), which highlights the psychological effects soldiers must overcome during deployment and the emotions they are afflicted with when returning home.

In Spring 2017, Junger's latest documentary feature, entitled [Hell on Earth: The Fall of Syria and the Rise of ISIS](#), premiered at the Tribeca Film Festival. Culled from nearly 1,000 hours of stunningly visceral footage, the film explores some of the horrific conditions that refugees commonly flee from, and show their humanity and courage in the face of physical threats as well as a largely hostile political environment. Junger captures the Syrian war's harrowing carnage and socio-political consequences while painting an alarming picture of the West's role in the creation of ISIS.

As an award-winning journalist Reporting on the war from the soldiers' perspective, Junger and photojournalist Tim Hetherington spent weeks at a time at a remote outpost that saw more combat than almost anywhere else in the country. This resulted in his best-seller [WAR](#), as well as [Restrepo](#). Hetherington was later killed while covering the war in Libya. Following his untimely death, Junger returned to Park City, Utah to debut the film, *Which Way is the Front Line From Here? The Life and Time of Tim Hetherington*, with high commendations at the 2013 Sundance Film Festival. Junger created this film in honor of Hetherington's original vision to capture stories that would broaden viewers' perceptions of war, and serve as a remembrance for his humanity and courage. Realizing the dangerous risks frequently taken by freelance photographers and reporters, Junger was motivated to start Reporters Instructed in Saving Colleagues (RISC), an organization that provides medical training for journalists in war zones, to commemorate the death of the acclaimed photographer. "Tim wanted to change the world," Junger recalls, "But he also wanted the world to change him" (New York Times).

Junger became a fixture in the international media when, as a first-time author, he commanded the New York Times best-seller list for more than three years with [The Perfect Storm](#), which became a major motion picture starring George Clooney.

His reporting on Afghanistan in 2000, profiling Northern Alliance leader Ahmed Shah Massoud, became the subject of the National Geographic documentary *Into the Forbidden Zone*. In 2001, his expertise and experience reporting in Afghanistan led him to cover the war as a special correspondent for ABC News and *Vanity Fair*. His work has also been published in *Harper's*, *The New York Times Magazine*, *National Geographic Adventure*, *Outside*, and *Men's Journal*. He has reported on the LURD besiegement of Monrovia in Liberia, human rights abuses in Sierra Leone, war crimes in Kosovo, the peacekeeping mission in Cyprus, wildfire in the American West, guerilla war in Afghanistan, and hostage-taking in Kashmir. He has worked as a freelance radio correspondent during the war in Bosnia.

Junger is a native New Englander and a graduate of Wesleyan University. Attracted since childhood to "extreme situations and people at the edges of things," Junger worked as a high-climber for tree removal companies. After a chainsaw injury, he decided to focus on journalism, primarily writing about people with dangerous jobs, from fire-fighting to commercial fishing (which led, of course, to [The Perfect Storm](#)).

In 1998, Junger established The Perfect Storm Foundation, a non-profit organization that provides educational opportunities for children of people in the maritime professions.

Junger has testified before Congress regarding veterans' affairs on numerous occasions.



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Nicholas Bohnsack

Head of Quantitative Research,
Strategas

Mr. Bohnsack is co-founder and partner of Strategas. He is the President and Chief Operating Officer of the Firm and heads the Firm's Institutional Securities and Financial Solutions business groups.

As an analyst, Mr. Bohnsack is head of Strategas' Quantitative Research team and directs the Firm's equity sector strategy and global asset allocation research efforts. More granularly he and his team focus on industry-level earnings and valuation forecasting and fundamental factor analysis to assist institutional investors in portfolio construction and thematic idea generation. He has been a regular guest on business news programs and has been widely quoted in the domestic and foreign press, particularly for his work on corporate profits and market valuation.

Prior to co-founding Strategas, Nicholas was an Investment Strategist and Associate Managing Director with International Strategy & Investment (ISI) Group. Nicholas began his career in the Investment Banking Group at FactSet and in Restricted Securities at Morgan Stanley.

Mr. Bohnsack received his MS in Mathematics from Fairfield University and received bachelor's degrees in Economics and Finance from Bryant University. He is a member of the Board of Advisors at Bryant University's College of Business. Nicholas and his wife, Brooke, live in Connecticut with their three sons.



Dan Clifton

Head of Policy Research,
Strategas

Mr. Clifton is a Partner at Strategas and the head of the Firm's DC office. He directs its legislative and public policy research efforts. Prior to joining Strategas he served as Executive Director of the American Shareholders Association (ASA), a non-partisan, non-profit organization which analyzes public policy affecting shareholders.

His research and political analysis on the interaction between legislation, policy and capital markets has been widely cited in the media. Mr. Clifton and his team have been recognized by *Institutional Investor* magazine in their annual survey for the past five years.

Prior to joining the ASA, Mr. Clifton served as Chief Economist and Federal Affairs Manager for Americans for Tax Reform and as a senior staff member in two gubernatorial administrations working on economic issues. Mr. Clifton received a MS in Economics and Public Finance from Rutgers University and a BA in Urban Planning and Policy Development also from Rutgers.



Jason DeSena Trennert

Chief Investment Strategist,
Strategas

Mr. Trennert is the Managing Partner of Strategas Research Partners LLC and the Chairman and Chief Executive Officer of the firm's broker-dealer subsidiary, Strategas Securities, LLC. In addition, as Chief Investment Strategist, Mr. Trennert is known as one of Wall Street's top thought leaders on the subject of markets and economic policy. His research pieces are read by leading institutional investors and corporate executives across the globe.

In 2006, Mr. Trennert co-founded Strategas, which originally began with just five employees. Today, the firm employs over fifty research analysts, institutional salesmen, and sales traders at its offices in New York, Washington D.C., and Columbus, Ohio. Prior to founding Strategas, Mr. Trennert was the Chief Investment Strategist and a Senior Managing Director at International Strategy & Investment (ISI) Group where he built and oversaw two of that Firm's most popular research efforts, its Company Surveys and Investment Strategy groups.

Widely quoted in the domestic and foreign press, Jason is a regular guest host on CNBC's "Squawk Box" and "Bloomberg Surveillance" with Tom Keene. His second book, *My Side of the Street*, was published by St. Martin's Press in May.

He was the Treasurer of La Scuola d'Italia where he built its investment committee. He is a member of the Board of Governors of The Columbus Citizens Foundation and a member of the investment committee of the Rockefeller Brothers Fund.

He has an MBA from The Wharton School at the University of Pennsylvania and BS in International Economics from Georgetown University.



Don Rissmiller

Chief Economist,
Strategas

Mr. Rissmiller is a founding Partner of Strategas and has directed the Firm's macroeconomic research efforts since 2006. He oversees Strategas' thematic research as well as high-frequency econometric forecasting.

Prior to co-founding Strategas in 2006, Mr. Rissmiller was an Economist and Managing Director at International Strategy & Investment (ISI) Group. Before joining ISI, he worked at the Federal Reserve Bank of New York, focusing on the analysis of U.S. macroeconomic data and price/wage forecasting models. He is frequently quoted in the financial press. He has been the president of the Forecasters Club of New York, a local group of economists. He serves on the board of the Global Interdependence Center (GIC) based in Philadelphia.

Mr. Rissmiller's research has been recognized by *Institutional Investor* magazine in their annual survey: he was ranked best up and coming economist in 2008, and was 3rd in their 2009 All-America Independent Research Team survey. Mr. Rissmiller holds an AB magna cum laude in Economics from Harvard.



Chris Verrone

Head of Technical Analysis,
Strategas

Mr. Verrone is a partner of Strategas. He is the head of the Firm's Technical Analysis Research team. His regularly published research highlights actionable investment opportunities across the equity, commodity, foreign exchange, and fixed income markets. In addition, Mr. Verrone actively works with the Firm's institutional clients to provide bespoke analysis on individual securities.

Chris is a frequent guest on CNBC, FOX Business, and Bloomberg Television, and is often quoted in the domestic and foreign financial press. He is consistently ranked among the top Technical Analysts on Wall Street in the annual All-America Research Survey by *Institutional Investor* magazine.

Mr. Verrone has earned the Chartered Market Technician (CMT) designation and is a member of the Market Technicians Association. Prior to joining Strategas, Mr. Verrone worked with the Economics team at International Strategy & Investment (ISI) Group and at the Foreign Policy Research Institute. Chris holds a MA in Comparative Politics from Villanova University and a BA in International Political Economy, also from Villanova. He is also active with the Delbarton School Alumni Association. Chris and his wife, Caroline, reside in New York City.

Accommodations

Rosewood Bermuda
60 Tucker's Point Drive, Hamilton
Parish, HS02, Bermuda

Please book your room under the Strategas room block by calling 441-298-4000 or by emailing Sherry Alvarado at Sherry.Alvarado@rosewoodhotels.com.