



Tarek Souki

Senior Vice President
Tellurian



Teresa Covington

Senior Vice President and
Chief Financial Officer
AeroVironment



Steve Gitlin

Vice President Corporate
Strategy, Communications &
Investor Relations
AeroVironment



Anthony Scaramucci

Founder and former Co-
Managing Partner
SkyBridge Capital



Dan Clifton

Partner & Head of Policy
Research,
Strategas Research Partners



Jason De Sena Trennert

Chairman & Chief Investment
Strategist,
Strategas Research Partners



Don Rissmiller

Partner & Chief Economist,
Strategas Research Partners



Chris Verrone

Partner & Head of Technical
Analysis,
Strategas Research Partners

Tuesday, November 13, 2018

05:45 PM to 07:30 PM

Corinthia Hotel - Northall Private
Dining Room**Dinner with Tarek Souki from Tellurian**

- **Tarek Souki**
Senior Vice President
Tellurian

Wednesday, November 14, 2018

08:00 AM to 08:45 AM

Royal Horseguards Hotel

Registration & Breakfast

08:45 AM to 09:30 AM

Whitehall Suite

Policy & Investment Implications of the US Midterm Elections

- **Dan Clifton**
Partner & Head of Policy Research,
Strategas Research Partners

09:30 AM to 10:15 AM

Drone Technology

- **Teresa Covington**
Senior Vice President and Chief Financial Officer
AeroVironment
- **Steve Gitlin**
Vice President Corporate Strategy, Communications & Investor Relations
AeroVironment

10:15 AM to 10:30 AM

Whitehall Reception

Break

10:30 AM to 11:00 AM

Whitehall Suite

Implications of U.S. Full Employment & Economic Outlook

- **Don Rissmiller**
Partner & Chief Economist,
Strategas Research Partners

11:00 AM to 11:30 AM

Requiem for the New Normal: A Real Business Cycle Emerges

- **Jason De Sena Trennert**
Chairman & Chief Investment Strategist,
Strategas Research Partners

11:30 AM to 11:45 AM

Whitehall Reception

Break & Refreshments



11:45 AM to 12:15 PM

Whitehall Suite

9 Year Bull Market... How Much Gas is Left in the Tank?

- **Chris Verrone**

Partner & Head of Technical Analysis,
Strategas Research Partners

12:15 PM to 01:15 PM

Anthony Scaramucci

- **Anthony Scaramucci**

Founder and former Co-Managing Partner
SkyBridge Capital

01:15 PM to 02:00 PM

Whitehall Reception

Lunch will be served

SPEAKERS



Tarek Souki

Senior Vice President
Tellurian

Tarek joined Tellurian as Senior Vice President – LNG Marketing and Trading in April 2016. Previously, he had been VP of Finance and Business Development at Cheniere Marketing in charge of middle office, back office and finance for the group. Before Cheniere, Tarek spent 14 years working for various financial institutions, including most recently at Credit Suisse in New York and London. There he specialized in corporate finance and project finance for resource and power companies. He earned an MBA from the University of Southern California and a BA in Economics from the University of California, Irvine.



Teresa Covington

Senior Vice President and Chief Financial Officer
AeroVironment

Teresa Covington has served as our Senior Vice President and Chief Financial Officer since 2017. Since joining AeroVironment in 2011, Teresa has provided financial leadership to AeroVironment and has served as a senior member of the company's finance team. Teresa served as the company's interim chief financial officer from February 5, 2015 to July 7, 2015. Teresa's responsibilities included financial analysis, planning, accounting, credit and collections as well as launching and leading a new product line management organization. Prior to joining AeroVironment, Teresa served as senior vice president and chief financial officer at Line 6, a global designer and manufacturer of musical instruments now part of Yamaha.

Teresa earned her master's in business administration from Stanford University Graduate School of Business, a master's in electrical engineering from the University of Southern California and a Bachelor of Science in electrical engineering from the University of Illinois at Urbana-Champaign.



Steve Gitlin

Vice President Corporate Strategy, Communications & Investor Relations
AeroVironment

Steve joined AeroVironment in 2002 to define the market entry strategy for one of the company's first commercial product lines. Reporting to the company's CEO he works to define, quantify and target new market opportunities in both its Unmanned Aircraft Systems and Efficient Energy Systems businesses. Steve communicates regularly with members of the press, Wall Street analysts and institutional investors to ensure an accurate understanding of AeroVironment's growth strategy, product and service offering, competitive environment and long-term prospects.

Steve received his Bachelor of Arts degree in Political Science from UCLA and later earned an MBA with a focus on Marketing from the Wharton School of the University of Pennsylvania, as well as a Master's in International Management with an emphasis on Latin America from the Joseph H. Lauder Institute at the University of Pennsylvania. Prior to joining AeroVironment Steve worked as a management consultant, serving global enterprises in the Aerospace and Telecommunications industries.



Anthony Scaramucci

Founder and former Co-Managing Partner
SkyBridge Capital

Anthony Scaramucci is the Founder and former Co-Managing Partner of SkyBridge Capital. He is the author of three books: *The Little Book of Hedge Funds*, *Goodbye Gordon Gekko*, and *Hopping Over the Rabbit Hole*, a [2016 Wall Street Journal](#) best-seller. Prior to founding SkyBridge in 2005, Scaramucci co-founded investment partnership Oscar Capital Management, which was sold to Neuberger Berman, LLC in 2001. Earlier, he was a vice president in Private Wealth Management at Goldman Sachs & Co. In 2016, Scaramucci was ranked #85 in *Worth Magazine's Power 100: The 100 Most Powerful People in Global Finance*. In 2011, he received Ernst & Young's "Entrepreneur of the Year – New York" Award in the Financial Services category. Anthony is a member of the Council on Foreign Relations (CFR), vice chair of the Kennedy Center Corporate Fund Board, a board member of both The Brain Tumor Foundation and Business Executives for National Security (BENS), and a Trustee of the United States Olympic & Paralympic Foundation. He was a member of the New York City Financial Services Advisory Committee from 2007 to 2012. In November 2016, he was named to President-Elect Trump's 16-person Presidential Transition Team Executive Committee. In June 2017, he was named the Chief Strategy Officer of the EXIM Bank. He served as the White House Communications Director for a period in July 2017. Scaramucci, a native of Long Island, New York, holds a Bachelor of Arts degree in Economics from Tufts University and a Juris Doctor from Harvard Law School.



Dan Clifton

Partner & Head of Policy Research,
Strategas Research Partners

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 De Sena Trennert

Chairman & Chief Investment Strategist,
Strategas Research Partners

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

Partner & Chief Economist,
Strategas Research Partners

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

Partner & Head of Technical Analysis,
Strategas Research Partners

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

Corinthia Hotel
Whitehall Pl, Westminster, London
SW1A 2BD, UK

£315

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