



Our 13th Annual Macro Conference will highlight important investment trends, large and small, driving the economy and the markets. An updated itinerary will be sent out as speakers are confirmed. If you are interested in attending, please be sure to reach out to your Strategas salesperson at 212-906-0130.



Dan Clifton

Partner & Head of Policy
Research,
Strategas Research Partners



Mark Donovan, CFA

Co-Chief Executive Officer &
Portfolio Manager
Boston Partners



Brad Katsuyama

Chief Executive Officer
IEX



Jeff Korzenik

Chief Investment Strategist
Fifth Third Investment
Management Group



Valerie Rockefeller

Chair
Rockefeller Brothers Fund



Ken Langone

Chief Executive Officer
Invemed Associates LLC.



Tyler Shultz

CEO and Co-Founder
Flux Biosciences, Inc



Mary Ellen Stanek

Chief Investment Officer &
President of Baird Funds
Baird Advisors



Tuesday, March 5, 2019

07:45 AM to 08:30 AM

Registration & Breakfast

New York Athletic Club - 180 Central
Park South, 9th Floor

08:30 AM to 09:15 AM

Fireside Chat with Ken Langone

Moderator - Jason De Sena Trennert, Chief Investment Strategist, Strategas

- **Ken Langone**
Chief Executive Officer
Invemed Associates LLC.

09:15 AM to 09:30 AM

Break

09:30 AM to 10:15 AM

Redemption, Inc.: The U.S. Economy and the Marginalized Worker

- **Jeff Korzenik**
Chief Investment Strategist
Fifth Third Investment Management Group

10:15 AM to 11:00 AM

Values-Aligned Investing

- **Valerie Rockefeller**
Chair
Rockefeller Brothers Fund

11:00 AM to 11:15 AM

Break

11:15 AM to 12:00 PM

What is The Bond Market Telling Us?

- **Mary Ellen Stanek**
Chief Investment Officer & President of Baird Funds
Managing Director
Baird Advisors

12:00 PM to 12:15 PM

Break - Please head to the 11th Floor for Lunch Session

12:15 PM to 01:15 PM

Lunch: Building a Better Market: Evolving Market Structure for Investors, Brokers, and Companies

NYAC - 11th Floor Main Dining Room

- **Brad Katsuyama**
Chief Executive Officer
IEX



01:15 PM to 01:30 PM

Break - Please head back to the 9th Floor

01:30 PM to 02:15 PM

Value Investing

NYAC - 9th Floor

• **Mark Donovan, CFA**

Co-Chief Executive Officer & Portfolio Manager
Boston Partners

02:15 PM to 03:00 PM

Fireside Chat with Tyler Shultz - Theranos

Moderator - Courtney Rosenberger, Director, Policy Research, Strategas

• **Tyler Shultz**

CEO and Co-Founder
Flux Biosciences, Inc

03:00 PM to 03:15 PM

Break

03:15 PM to 04:15 PM

Cocktails with Clifton

• **Dan Clifton**

Partner & Head of Policy Research,
Strategas Research Partners

SPEAKERS



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.

**Mark Donovan, CFA**

Co-Chief Executive Officer & Portfolio Manager
Boston Partners

Mr. Donovan is Co-Chief Executive Officer of Boston Partners and lead portfolio manager for Boston Partners Large Cap Value portfolios. He is responsible for strategic and tactical operating decisions affecting the firm. He was one of the founding partners of Boston Partners Asset Management in 1995. He joined the firm from The Boston Company where he was Senior Vice President and equity portfolio manager. He also spent five years as a consulting associate with Kaplan, Smith & Associates, and two years as a securities analyst for Value Line Inc. Mr. Donovan holds a B.S. degree in management from Rensselaer Polytechnic Institute. He holds the Chartered Financial Analyst designation. He has thirty-six years of investment experience.



Brad Katsuyama

Chief Executive Officer
IEX

As CEO, Brad oversees both the long-term strategic direction of IEX and its day-to-day management. As a former head risk trader and head of electronic trading at RBC Capital Markets, he is hands-on in the development of the products and services that IEX builds for clients.

Brad was one of the co-founders of IEX in 2012 after their team uncovered ways that the existing stock exchanges were selling high speed technology and data to the detriment of long-term investors. Brad and his team's pursuit of a fairer market has been chronicled in Michael Lewis' book *Flash Boys*, as well as in outlets ranging from *60 Minutes* to the *New York Times Magazine* and *Bloomberg Markets*. Brad was honored as part of New York Times Dealbook's inaugural class of *Groundbreakers*.



Jeff Korzenik

Chief Investment Strategist
Fifth Third Investment Management Group

Jeff Korzenik is Chief Investment Strategist for Fifth Third Bank, where he is responsible for the Bank's overall client investment strategy.

For more than 30 years, Jeff has been a thought leader in the investment industry. A regular guest on CNBC's Squawk Box and Bloomberg, Jeff's writings on economics and public policy have been published in Barron's, Forbes, The Chicago Tribune and other periodicals. He has been quoted in publications including The New York Times and The Wall Street Journal. A leading expert on private sector models for the re-employment of ex-offenders, Jeff is a sought-after public speaker; he has presented at the Detroit Economic Club, national conferences of the American Bankers Association, the AICPA and for numerous other organizations. Jeff was invited to testify on Capitol Hill as an expert witness on the use of commodity indexes by pensions and other institutional investors.

Jeff earned both a Bachelor of Arts degree in Economics and a Certificate of Proficiency in Near Eastern Studies from Princeton University in Princeton, N.J.

A passionate supporter of cultural organizations, Jeff serves as a Trustee of the Harris Theater for Music and Dance, and as an Overseer of the Peabody Essex Museum.



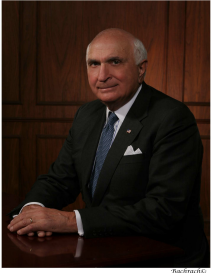
Valerie Rockefeller

Chair
Rockefeller Brothers Fund

Valerie Rockefeller chairs the board of the Rockefeller Brothers Fund, a private foundation advancing social change that contributes to a more just, sustainable, and peaceful world. Her professional background is as a middle school special education teacher for adolescents with learning differences and emotional disabilities. She began her teaching career at Central Park East Secondary School in East Harlem, New York, and also taught in Australia.

Valerie has a M.Ed. in Special Education from Bank Street College of Education and a MAT in secondary Social Studies from Columbia University Teachers College. She majored in International Relations at Stanford University, and worked as a confidential assistant to Secretary Richard Riley at the U.S. Department of Education during the first Clinton administration. She also serves as a trustee of Achievement First, the Asian Cultural Council, Columbia University Teachers College, D.C. Preparatory Academy, Greenwich Academy, the Gilder Lehrman Institute of American History, and Rockefeller Philanthropy Advisors. Ms. Rockefeller was a trustee of Spelman College, and is a member of the Council on Foreign Relations.

Ms. Rockefeller lives with her daughters Percy and Lucy and her son Davis in Old Greenwich, Connecticut.



Ken Langone

Chief Executive Officer
Invemed Associates LLC.

Kenneth Langone is the founder and Chief Executive Officer of Invemed Associates LLC., a New York Stock Exchange member firm specializing in healthcare and high technology companies. He received a BA from Bucknell University and an MBA from New York University's Stern School of Business; he remains active with both institutions currently serving on the board of overseers of the Stern School and on the board of trustees of New York University as well as chairman of the Trustees of New York University Medical Center. In April 2008 the medical center was renamed the NYU Langone Medical Center reflecting a major gift from Elaine and Ken. He was a member of the Bucknell University Board of Trustees where he served as Chairman of its nominating committee, its endowment and as a member of its executive committee. He is a co-founder of The Home Depot. and was lead director and a member of the executive committee of its board since it was founded in 1978 until 2008. He also serves on the boards of Unifi, Inc., Micell Technologies, Relationship Sciences and Juice Press. In addition he serves on the boards of The Center for Strategic and International Studies where he is also a member of the Executive Committee, The Ronald McDonald House of NY, Horatio Alger Society Foundation and the Harlem Children's Zone and its charter school, The Promise Academy and St. Patrick's Cathedral where he led the fundraising effort for recent restoration and renovation. He served on the board of the Medal of Honor Foundation until he recently stepped down. Ken and Maurice "Hank" Greenberg have spearheaded the establishment of the Greater NYC Military Family Center Consortium, a collaboration between NYU School of Medicine, Columbia School of Medicine. The center provides support to veterans dealing with brain trauma and or PTSD. He is a Member of The Association of Master Knights of the Sovereign Military Order of Malta, American Chapter and a Knight of the Order of St. Gregory the Great.



Tyler Shultz

CEO and Co-Founder
Flux Biosciences, Inc

Tyler Shultz is an entrepreneur fostering innovation in healthcare. He graduated from Stanford with a Biology degree and entered the national scene when he courageously blew the whistle at Theranos. Tyler complained to the public health regulators in New York and was a source for a series of *Wall Street Journal* articles exposing Theranos' dubious blood-testing practices. Owing to his role in exposing the fraud, Shultz was featured in *Bad Blood*, the book about the scandal penned by John Carreyrou, the original author of the *Wall Street Journal* articles, as well as in Alex Gibney's HBO documentary *The Inventor*.

Currently, Shultz is the CEO and Co-Founder of Flux Biosciences, Inc., a bay-area start-up. Flux Biosciences aims to bring medical grade diagnostics into the homes of consumers by using cutting-edge technology to measure biomarkers related to stress, exercise, and fertility. His efforts were recognized by *Forbes* when he was named to their "30 under 30" Health Care 2017 list.



Mary Ellen Stanek

Chief Investment Officer & President of Baird Funds
Managing Director
Baird Advisors

Education: B.A. Marquette University (1978), Magna Cum Laude, Phi Beta Kappa
M.B.A., University of Wisconsin, Milwaukee (1984)

Professional Designation: Chartered Financial Analyst (1983)

Mary Ellen Stanek, CFA, has nearly 40 years of investment management experience. She currently serves as Managing Director of Robert W. Baird & Co. and Chief Investment Officer of Baird Advisors responsible for over \$65 Billion in Assets under Management. Additionally, she serves as President of the Baird Funds. Under Mary Ellen's leadership, the Baird Advisors team was named a finalist for the Morningstar, Inc.'s 2016 Fixed Income Fund Manager of the Year Award. Previously she had served as President and CEO of Firstar Investment Research & Management Company.

Mary Ellen is a member of The CFA Institute, the CFA Society of Milwaukee, the Greater Milwaukee Committee (past Board Chair), Milwaukee 7 (past Co-Chair), Tempo (past President), Professional Dimensions and Milwaukee Women inc.

Mary Ellen serves on the boards of Baird Financial Group, [Northwestern Mutual](#), and [WEC Energy Group](#) (NYSE:WEC). She also serves on the boards of All-In Milwaukee, Boys and Girls Clubs (past Board Chair), Children's Hospital Foundation, Faith In Our Future Trust, Froedtert Health, Greater Milwaukee Committee, Greater Milwaukee Foundation, Medical College of Wisconsin (past Board Chair), and Milwaukee World Festival. She served on the Board of Marquette University where she chaired the Board and was elected Trustee Emerita. She has co-chaired annual campaigns for the United Performing Arts Fund and the United Way.

Mary Ellen has received the Marquette University Alumna of the Year (2010), the Marquette University College of Arts and Sciences Person for Others Award, Marquette University High School's Spirit of St. Ignatius Award, The St. Francis Children's Service Award, The Tempo Mentor Award, The Business Journal Women of Influence Award, The Point of Light Award, Professional Dimensions Sacagawea Award, Wisconsin Business Hall of Fame Distinguished Executive Award, Baird's Brenton H. Ruppel Citizenship Award and the Herb Kohl Champion Award. She and her husband were named "Parents of the Year" by COA Youth and Family Centers (2011). In 2012, she received the MVP Award from Boys & Girls Clubs.

Mary Ellen and her husband, Scott, have three children: Peter (Erin), Katie (Tim), and Patrick and three granddaughters: Emme, Abigail and Kathryn.

Accommodations

**New York Athletic Club - 180
Central Park S, New York, NY 10019**

Strategas Room Block rate: \$290
Please call Claudia Annarumma
212-767-7133
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