



STRATEGAS

Strategas' Annual West Coast Investment Forum

Jackson Hole, Wyoming

Wednesday, July 10, 2024 - Friday, July 12, 2024



Beni Gradwohl

Co-Founder and CEO
Cognovi Labs



Daniel Clifton

Head of Policy Research
Strategas



Jason De Sena Trennert

Chief Investment Strategist
Strategas



Chris Verrone

Head of Technical Analysis &
Macro Research
Strategas



Don Rissmiller

Chief Economist
Strategas

Wednesday, July 10, 2024

06:00 PM to 09:00 PM

Cloudveil - Rooftop Terrace

Welcome Reception**Thursday, July 11, 2024**

07:00 AM to 07:45 AM

Lupine Foyer

Breakfast

07:45 AM to 08:30 AM

Lupine Room

Strategas Analyst Roundtable - Market & Economic Outlook**• Jason De Sena Trennert**Chief Investment Strategist
Strategas**• Chris Verrone**Head of Technical Analysis & Macro Research
Strategas**• Don Rissmiller**Chief Economist
Strategas

08:30 AM to 08:45 AM

Break

08:45 AM to 11:15 AM

Investment Roundtable

11:15 AM to 11:30 AM

Break - Please make your way to the Cloudveil rooftop

11:30 AM to 12:30 PM

Cloudveil - Rooftop Terrace

Lunch - Artificial Intelligence**• Beni Gradwohl**Co-Founder and CEO
Cognovi Labs

12:30 PM to 12:45 PM

Break - Please make your way back down to the Lupine Room

12:45 PM to 03:00 PM

Lupine Room

Investment Roundtable II

03:00 PM to 03:15 PM

Break

03:15 PM to 04:00 PM

The Economic and Investment Implications of the 2024 Election



- **Daniel Clifton**
Head of Policy Research
Strategas

05:40 PM to 06:00 PM

2820 Rungius Rd, Jackson, WY
83001

Transportation begins for Dinner at the Museum

Central location for all attendees staying at various hotels. First van: 5:40pm (this can accommodate all guests and will get you to the start of the cocktail reception) Second van: 6:00pm (for any guest running late)

06:00 PM to 09:00 PM

Group Dinner at the National Museum of Wildlife Art

Friday, July 12, 2024

07:00 AM to 12:00 PM

To Be Announced

Group Activities

Hiking, Fly fishing and rifle shooting.

SPEAKERS



Beni Gradwohl

Co-Founder and CEO
Cognovi Labs

Beni Gradwohl is Co-Founder and CEO of Cognovi Labs, an artificial intelligence (AI) company that focuses on measuring the emotional drivers behind human decision-making. Cognovi's award-winning psychology-driven AI helps clients in the public, commercial, and health sectors reveal how audiences are feeling in the moment, anticipate their action and intent, and then communicate with the emotions to maximize impact.

Gradwohl has been on a journey to understand how people behave and find a systematic way to measure decision-making for more than 20 years. During that time, Gradwohl held senior leadership positions at Citi, Morgan Stanley and various investment management firms. An astrophysicist by training, he spent the first decade of his professional career in academia and research.

Widely featured in the news, including Inc., Forbes and the Financial Times, Gradwohl is frequently invited to speak on topics at the intersection of AI and behavioral psychology, the impact of emotional intelligence in human interactions, and how to engage emotionally to drive a better outcome. Gradwohl received his Ph.D. in Physics from The Hebrew University in Jerusalem, Israel.



Daniel Clifton

Head of Policy Research
Strategas

Daniel Clifton is a Partner and Head of Policy Research for Strategas Securities. In this capacity, Mr. Clifton evaluates the financial market implications of policy and political developments. This includes analyzing tax, trade, infrastructure, healthcare, energy, defense and other policy initiatives to determine how public policy changes impact the economy and financial markets for institutional investors.

Daniel leads Strategas' Washington policy research team, which has been ranked as one of the top policy research teams on Wall Street for 14 consecutive years according to *Institutional Investor*. Mr. Clifton is also a top ranked analyst in the category of Tax and Accounting policy.

Currently, Daniel is ranked as the top *Independent* research analyst on Wall Street, across all research verticals, according to the same *Institutional Investor* survey.

Mr. Clifton's research on the interaction between policy, elections, and financial markets is widely cited in the media and Daniel is a frequent guest on CNBC, Bloomberg, and Fox Business.

Prior to joining Strategas, Mr. Clifton was Executive Director of the American Shareholders Association (ASA), a non-partisan, non-profit organization which analyzes public policy affecting shareholders. Daniel also worked on tax policy issues prior to the ASA and has been involved in every major tax policy change over the past twenty years. Prior to moving to Washington, Mr. Clifton served as a senior staff member in two gubernatorial administrations working on economic and fiscal policy issues.

Mr. Clifton received both his BA in Urban Planning and his MS in Public Policy from Rutgers University where he was a Fellow at the Eagleton Institute of Politics and a Harold Martin Fellow for Public Policy.



Jason De Sena Trennert

Chief Investment Strategist
Strategas

Mr. Trennert is the Chairman of Strategas and its related companies and the Chief Executive of the Firm's institutional broker-dealer, Strategas Securities. 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 salespeople, sales traders, and capital markets professionals 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 on business news programs broadcast by CNBC, CNBC Italia, Fox Business News, and Bloomberg TV, among others. He is the author of three books about investing and the investment business. *My Side of the Street* was published by St. Martin's Press in May 2015. He has penned several op-eds for *The Wall Street Journal*, *the Financial Times*, and *Investor's Business Daily*.

Mr. Trennert's two most notable calls involved coining the phrase "TINA" as it relates to equities in a world of perpetually low interest rates and his early recognition of the potential allure of Donald Trump as a presidential candidate. His op-ed "The Stock Market and 'The TINA' Factor" was published in *The Wall Street Journal* in April 2013. "What the Donald Got Right" was published in *Investor's Business Daily* in May 2011. His piece "Donald Trump is Underowned" appeared on the website *Real Clear Markets* in August 2015. Mr. Trennert credits his often out-of-consensus calls to his frequent travels to visit clients in 44 states and 20 foreign countries.

He is committed to a number of Italian, Italian-American, and Catholic causes in New York and abroad. Mr. Trennert is a member of the investment committee of the Rockefeller Brothers Fund and sits on the advisory board at Hollow Brook Wealth Management LLC.

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



Chris Verrone

Head of Technical Analysis & Macro Research
Strategas

Mr. Verrone is a partner of Strategas and is the head of the Firm's Technical Strategy & Macro Research team. He is also a member of the Firm's Asset Allocation and Investment Policy committee. His regularly published research highlights actionable investment opportunities across the equity, commodity, foreign exchange, and fixed income markets.

Chris is a frequent guest on CNBC, Bloomberg Television, and Fox Business, and is often quoted in the domestic and foreign financial press. He has consistently ranked among the top macro analysts on Wall Street in the annual All-America Research Survey by Institutional Investor magazine over the last decade, and is particularly known for combining a rigorous examination of financial history with empirically driven analysis.

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 an MA in Political Science from Villanova University and a BA in International Political Economy, also from Villanova. He is also active with the Delbarton School Alumni Association. Chris, his wife, Caroline, and their three children, Maggie, Reagan, and Connor reside in Connecticut.



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 has been a winner of their economic forecasting competition. He also serves on the board of the Global Interdependence Center (GIC) based in Philadelphia, and was the chair from 2018-2019.

Mr. Rissmiller's research has been consistently recognized by *Institutional Investor* in their annual survey. Mr. Rissmiller holds an AB magna cum laude in Economics from Harvard.

Accommodations

Cloudveil
112 Center St, Jackson, WY 83001

Night rate - \$989

Please call 307-699-6100 and ask for the Strategas room block or use the below booking link:

[Book your group rate for Strategas Securities Conference 2024](#)