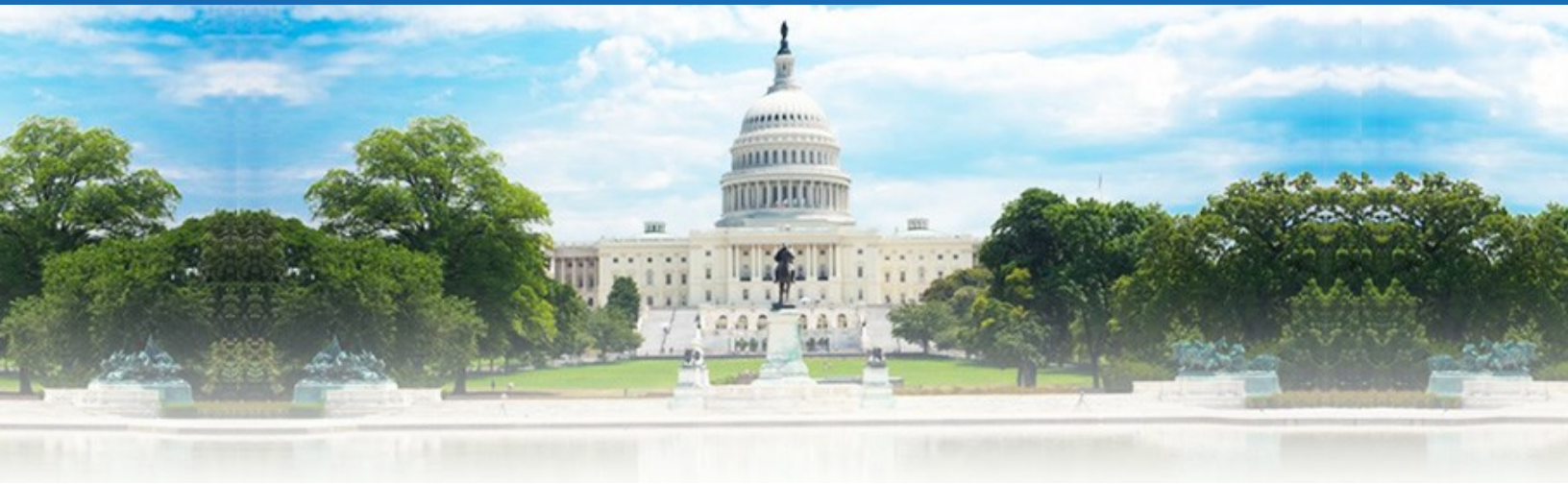




STRATEGAS

15th Annual Policy Conference

Hay Adams Hotel - 800 16th St NW, Washington, DC 20006
Tuesday, February 10, 2026



Dan Clifton

Head of Policy Research
Strategas



Anders Fogh Rasmussen

Former Prime Minister of
Denmark & Head of NATO



Mark Halperin

Senior Political Analyst,
MSNBC and Time Magazine;
Co-Author, "Game Change"



Tim Keeler

Partner and Co-Head of
International Trade
Mayer Brown



Andrew Olmem

Partner
Mayer Brown



Bruce P. Mehlman

Partner
Mehlman Consulting



Mike Sommers

President & CEO
American Petroleum Institute



Michael Williams

Founder and President
The Williams Group



Tuesday, February 10, 2026

07:30 AM to 08:15 AM

The Hay Adams Hotel - Top of the Hay

Breakfast and Registration

08:15 AM to 09:15 AM

US Political and Policy Overview

- **Bruce P. Mehlman**

Partner
Mehlman Consulting

09:15 AM to 10:00 AM

Investment Implications from 2026 Policy Events

- **Dan Clifton**

Head of Policy Research
Strategas

10:00 AM to 10:15 AM

Break

10:15 AM to 11:00 AM

Greenland and Geopolitics

- **Anders Fogh Rasmussen**

Former Prime Minister of Denmark & Head of NATO

11:00 AM to 11:45 AM

US Energy Policy Outlook

- **Mike Sommers**

President & CEO
American Petroleum Institute

11:45 AM to 12:00 PM

Break for Lunch

12:00 PM to 01:00 PM

The Trump Uncertainties of 2026 (and the Certainties....)

- **Mark Halperin**

Senior Political Analyst, MSNBC and Time Magazine; Co-Author, "Game Change"

01:00 PM to 01:15 PM

Break

01:15 PM to 02:00 PM

Congressional Outlook, Democratic Policy Agenda In 2027, 2028 Presidential Race

- **Michael Williams**

Founder and President
The Williams Group



02:00 PM to 02:45 PM

Financial De-Regulation In 2026

- **Andrew Olmem**

Partner

Mayer Brown

02:45 PM to 03:30 PM

Supreme Court & Possible Replacement Plans

- **Tim Keeler**

Partner and Co-Head of International Trade

Mayer Brown



SPEAKERS



Dan 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 is the #1 ranked Washington policy team on Wall Street, according to *Institutional Investor (II)*. Dan and his team have been ranked as one of the top Washington policy teams in each of the past 16 years. Mr. Clifton is also a top ranked analyst in the category of Accounting and Tax Policy according to the same *II* report.

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.



Anders Fogh Rasmussen

Former Prime Minister of Denmark & Head of NATO

[Anders Fogh Rasmussen](#) has been at the centre of European and global politics for more than three decades—as Secretary General of NATO, Prime Minister of Denmark, Danish Minister of Economic Affairs, and a leading Danish parliamentarian. He is the Founding Chairman of Rasmussen Global, where he advises companies and democratic governments around the world.

Anders began his political career in 1978, becoming Denmark's youngest member of Parliament at the age of 25. He was named Minister of Economic Affairs in 1990 and became Prime Minister of Denmark in 2001. In 2009, Anders was appointed Secretary General of NATO—the world's preeminent military alliance.

In July 2022, Ukrainian President Volodymyr Zelenskyy asked Anders to co-chair an international taskforce on security guarantees for Ukraine. The resulting Kyiv Security Compact, co-authored with President Zelenskyy's Chief of Staff Andriy Yermak, has since become the basis for a web of security guarantees negotiated between Ukraine and NATO allies. In May 2024, the Rasmussen-Yermak taskforce released a report which outlined a series of recommendations on Ukraine's path to NATO membership.



Mark Halperin

Senior Political Analyst, MSNBC and Time Magazine; Co-Author, "Game Change"

His New York Times #1 best-selling book "Game Change" demonstrates Mark Halperin's unmatched sources at the senior levels of both political parties and his ability to spotlight the substance, drama and consequence of modern politics.

Called the insiders insider by The New York Times and the high priest of establishment political journalism by Politico, Mark Halperin is one of America's most respected political reporters. As the senior political analyst for TIME magazine and the former political director of ABC News, Halperin has covered national politics and government for more than twenty years, including six presidential campaigns. He appears regularly on broadcast and cable television programs, including NBC's Meet the Press and PBS's Charlie Rose, on which he is the most frequent guest in the show's history. Halperin is also senior political analyst for MSNBC, with weekly appearances on Morning Joe, Hardball and other MSNBC programs. Halperin is a down-the-middle, lifelong journalist who is as insightful and humorous, decoding President Obama's legislative agenda for his second term to the future of the Republican Party. His best-selling book, Game Change, which he co-authored with New York magazine's John Heilemann, has garnered wide-spread acclaim. HBO Films adapted the book for a movie debuting in March 2012 to an impressive 2.1 million viewers making it one of HBO's most successful original movies ever. The HBO movie received 12 Emmy nominations, winning five Emmy awards including one for outstanding TV movie and five Golden Globe nominations and winning two awards including one for best miniseries/TV movie. Halperin and Heilemann's new book about the 2012 Presidential campaign, Double Down: Game Change 2012, will be published Fall, 2013. HBO has optioned the rights to the new book for a movie.



Tim Keeler

Partner and Co-Head of International Trade
Mayer Brown

Tim Keeler joined Mayer Brown after a varied career in the US Government, serving at the Office of the US Trade Representative (USTR), the US Treasury Department (which chairs CFIUS), and the US Senate Finance Committee. He advises clients on all aspects of CFIUS work, including:

- Assessing whether prospective transactions raise national security issues
- Advising whether a transaction is subject to mandatory filing pursuant to CFIUS regulations
- Advising on how to structure transactions to mitigate national security concerns while achieving business objectives
- Implementing all phases of regulatory clearance under the CFIUS process

Tim also advises and advocates for clients on high-profile International Trade law and policy, including investigations and tariff actions by the USTR under Sec. 301 of the Trade Act of 1974; safeguard investigations and tariff remedies by the International Trade Commission (ITC) and the USTR under Sec. 201 of the Trade Act of 1974; the consistency of various legal regimes – or proposed laws – with World Trade Organization (WTO) rules and other international legal obligations; international trade negotiations in the WTO, Free Trade Agreements, and other arrangements; and WTO and other trade agreement litigation.

Tim was previously the Chief of Staff in the Office of the US Trade Representative (USTR) from 2006 - 2009, where he oversaw implementation of US policy, strategy and negotiations involving all aspects of international trade and investment matters. He worked on a number of key issues including: climate change and trade; US and China relations; WTO negotiations and litigation; free trade agreement negotiations and implementation; and CFIUS decisions.

Before working for USTR, Tim spent more than five years at the Treasury Department from 2001 – 2006. He joined the Office of Legislative Affairs in 2001 as a Deputy to the Assistant Secretary for International Issues, where he was responsible for Treasury's legislative strategy on issues including CFIUS, foreign exchange rate policy testimony, appropriations for US funding of the World Bank, and US participation in the International Monetary Fund. He later managed the Office of Legislative Affairs from 2002 - 2006 and assisted on all policy and personnel issues in the Office. This included leading Treasury nominees through the US Senate confirmation process, and legislative strategy on Treasury Intelligence and Anti-Terrorist Financing matters.

Tim also served on the Presidential Transition Team in 2000–2001 as a policy coordinator on export control and trade remedy policy, handling the Commerce Department's Bureau of Export Administration (now called the Bureau of Industry and Security) and the International Trade Commission (ITC). Earlier in his career (1998-2000), Tim served as a professional staff member for international trade on the US Senate Finance Committee under Chairman William V. Roth (R-DE).

In recognition of his government service, Tim was awarded the USTR Distinguished Service Award, the Treasury Distinguished Service Award, and the Treasury Secretary's Honor Award twice.

Tim is a member of the Board of Directors of the Washington International Trade Association. He was also an Adjunct Professor at Georgetown University in both the School of Law—co-teaching a course on US and WTO law, policy, and politics, and the School of Foreign Service.



Andrew Olmem

Partner
Mayer Brown

Clients rely on Andrew Olmem for advice and counsel on complex financial services regulatory and legislative matters, including matters involving federal financial regulatory agencies, evaluating prospective legislation and regulations, advising on new legislative and regulatory requirements, and representing clients in congressional and regulatory investigations and other reputational risk matters.

Andrew previously served as the Deputy Assistant to the President for Economic Policy and Deputy Director of the White House National Economic Council (NEC), where he oversaw the development and coordination of the administration's domestic economic policies, including for financial services, technology, telecom, energy, and infrastructure. At the White House, he played a key role in the passage of the Coronavirus Aid, Relief, and Economic Security (CARES) Act, landmark legislation to address the economic downturn due to the coronavirus, and oversaw the administration's regulatory reform initiatives. Andrew's work coordinating economic policy has been publicly praised by the leadership of US financial regulators.

Before joining the White House, Andrew served as the Republican Chief Counsel and Deputy Staff Director for the US Senate Banking Committee. During his more than seven years at the Banking Committee, Andrew helped craft a wide range of financial services legislation, conducted congressional investigations, and participated in the consideration of legislation in response to the 2008-2009 financial crisis, including the Emergency Economic Stabilization Act (TARP) and the Housing and Economic Recovery Act. He was a lead staff negotiator for the Dodd-Frank Act. Before attending law school, Andrew served as an assistant economist for monetary policy at the Federal Reserve Bank of Richmond. A frequent commentator on economic policy and financial regulation, he has appeared on CNBC, Fox Business News, Bloomberg, and C-Span, and has been covered by the Wall Street Journal, the Washington Post, and Politico. Andrew has also testified before the House Financial Services Committee and the Senate Banking Committee.

Washingtonian Magazine listed Andrew as one of the 500 Most Influential People in Washington, while The American Lawyer named him one of their "Trailblazers," recognizing individuals who are agents of change in the legal industry.



Bruce P. Mehlman

Partner
Mehlman Consulting

With over two decades experience in public policy, business and the law, Bruce helps leaders and organizations understand, anticipate and navigate political risk.

Mehlman is a highly sought-after keynote speaker on policy and political trends, regularly headlining business conferences and strategic planning sessions. His quarterly infographic analyses are consistently picked-up by national media and eagerly consumed by tens of thousands of readers around the world. Television networks such as CNBC, Fox News, Fox Business and Hearst often ask Bruce to appear to discuss trends and their implications.

Bruce previously served as Assistant Secretary of Commerce for Technology Policy under President George W. Bush. He also worked as a senior leadership aide in the House of Representatives, general counsel to a national political party committee and policy counsel to Cisco Systems.

Bruce is widely-regarded as an expert in running coalitions, quarterbacking issue campaigns and managing C-suite associations, bringing innovative approaches and determined execution to achieve impactful outcomes. An Adjunct Professor and Board Member of The Washington Campus, Bruce frequently lectures MBA candidates on “effective business-government relations.”

Bruce serves on the advisory boards of start-up companies including FiscalNote, iLearningEngines, and Virtu, in addition to serving on the Boards of the Center for Democracy & Technology, the Washington Campus, and the State Science & Technology Institute.

Bruce received a BA degree from Princeton University and a JD from the University of Virginia Law School where he served on the Virginia Law Review.



Mike Sommers

President & CEO
American Petroleum Institute

Mike Sommers is the 15th chief executive of the American Petroleum Institute (API), the largest trade association representing all aspects of America's natural gas and oil industry.

Since his appointment in July 2018, Sommers has overseen the strategic realignment of API's priorities and advocacy efforts, introducing an integrated organizational structure and core API Principles. Among other initiatives, he led the organization through an unprecedented period in global energy markets, effectively positioned the industry through political transitions in Washington and in state capitols across the country, increased utilization and visibility of API standards and safety programs, and led the adoption of the industry's solutions-oriented efforts to address the risks of climate change.

Sommers is a regular contributor and thought leader on major cable news networks. In 2021, Fortune Magazine Sommers among its 50 World's Greatest Leaders.

Previously, Sommers headed the American Investment Council, representing the nation's leading private equity and growth capital firms and other business partners.

Throughout his career, Sommers has held critical leadership roles in the U.S. House of Representatives and at the White House, including as Chief of Staff for Speaker of the House John A. Boehner and Special Assistant to President George W. Bush at the National Economic Council.

Sommers is a native of Naperville, Ill., and a graduate of Miami University in Oxford, Ohio. He is married to Jill Sommers, a former Commissioner at the Commodity Futures Trading Commission (CFTC). They have three children in college and live in Alexandria, Virginia.



Michael Williams

Founder and President
The Williams Group

The Williams Group is led by Michael Williams, who has more than two decades of experience in business advocacy and strategic communication as well as federal and state government service.

Prior to founding The Williams Group, Michael was a Managing Director of Credit Suisse in the Public Policy Americas division, based in Washington, D.C. He was responsible for maintaining and expanding the Bank's relationships with members and staff of the congressional tax-writing committees and other committees such as Financial Services, Banking and Foreign Relations. Michael was directly involved in the formulation and implementation of the Bank's legislative policies and strategies.

Michael joined Credit Suisse in February 2007 from The Bond Market Association/Securities Industry and Financial Markets Association's Washington, D.C. office, where he was Senior Vice President. In this capacity, he was responsible for representing the Association's views to various congressional committee and regulators. In addition, he oversaw the Association's close working relationships with state and local governments and their representative organizations.

Michael served as Special Assistant to the President and Staff Director for Legislative Affairs during the Clinton Administration, where he was a key member of the White House team responsible for developing and implementing the Administration's agenda on financial services, tax and international trade legislation. Michael also served as a Deputy Assistant for Congressional Affairs at the Office of the U.S. Trade Representative during the Clinton Administration. Michael has coordinated and participated in numerous election campaigns at the federal, state and local levels. He has also served as a congressional liaison for the National Democratic Convention for more than 14 years.

Michael holds a Bachelor degree in Sociology and Masters in Public Administration from the State University of New York at Albany. He also holds a Masters in Business Administration from the University of Maryland.