FIDUCIARY
INVESTMENT ADVISORS

# 2015 Client Conference Agenda

**Hyatt Regency Newport Hotel & Spa**
**June 18, 2015**

| TIME | BRETON HALL |
|---|---|
| 7:45 – 8:30 AM | **Registration & Continental Breakfast** |
| 8:30 – 8:45 AM | ***Welcome to Newport***<br>Doug Stark<br>Museum Director, International Tennis Hall of Fame |
| | ***FIA Welcome & State of the Firm***<br>Mark R. Wetzel, President<br>Michael Goss, Executive Vice President |
| 8:45 – 9:45 AM | ***Global Economics & Capital Markets Overview***<br>**James Paulsen, Ph.D.**<br>Chief Investment Strategist<br>Wells Capital Management |
| 9:45 – 10:30 AM | ***Retirement Industry Trends***<br>**Stuart Ritter, CFP**<br>Senior Financial Planner<br>T. Rowe Price Associates, Inc. |
| 10:30 – 10:45 AM | **15 Minute Break** |
| 10:45 – 11:30 AM | ***Compliance Update & Legislative Trends***<br>**Bradford P. Campbell**<br>Counsel<br>DrinkerBiddle |
| 11:30 – 12:15 PM | ***The Debate Redefined: It's Not Either/Or –***<br>***Active & Passive Investing Can Coexist in a Well-Constructed Investment Program***<br>**John Ameriks, Ph.D.**<br>Principal and Head of Quantitative Equity<br>Vanguard |
| 12:15 – 1:00 PM | **Lunch** |

| ROOM -> | ROOM | BRETON HALL | ROOM |
|---|---|---|---|
| 1:00 – 2:00 PM | **From the Office of the CIO: A Portfolio, Market, & Operational Discussion with Endowment Leaders** | **WORKPLACE FINANCIAL WELLNESS What Employees Want and Need** | **'Major League' Strategies for Pension Plan Management** |
| | **Jim Collins,** Chief Investment Officer<br>Clark University<br><br>**Chris Brown,** Chief Investment Officer<br>Bucknell University<br><br>*Moderator: Michael Chase<br>Consultant* | **Karen Paulson**, CIMA, PRP<br>Principal & Senior Consultant<br><br>**Mary Legg**, CEBS<br>Financial Educator | **Jean McGurl,** Asst. Director of HR<br>Boston Red Sox<br><br>**Tracy A. Vitols**, Partner<br>Hinckley Allen<br><br>**Barry D. Cohen**, President<br>Albion Consulting Group, Inc.<br><br>*Moderator: Kevin O'Brien, CFA<br>Consultant* |
| **ROOM ->** | **ROOM** | **BRETON HALL** | **ROOM** |
| 2:00 – 3:00 PM | **Filling in the Gaps: Non-Traditional & Supplemental Plans for Your Organization (A Case Study Approach)** | **Staying Ahead of the Curve: A Look at Tomorrow's Defined Contribution Plan** | **Death & Taxes: How to Try to Avoid One!** |
| | **Mike Roach,** Partner<br>Pension Consultants, Inc.<br><br>**Rachel Faye Smith,** Partner<br>Murtha Cullina LLP<br><br>*Moderator: Tyler Polk, AIF®<br>Consultant* | **Bruce Barth,** Partner<br>Robinson & Cole<br><br>**Chris Daley,** Managing Director<br>J.P. Morgan Asset Management<br><br>**Michelle Scichilone,** Assistant VP for Human Resources<br>Brandeis University<br><br>*Moderator: Ryan Gardner<br>Principal & Senior Consultant* | **Alfred Casella**, Partner<br>Estate Planning Attorney<br>Murtha Cullina<br><br>**Barbara Taylor**, Stockholder<br>Estate Planning Attorney<br>Reid & Riege<br><br>**Shawn Wilson, JD,** Managing Director, Personal Trust Services Division<br>Charles Schwab Bank<br><br>*Moderator: Andrew Salak<br>Assoc. Director, Wealth Advisory Services* |
| 3:00 – 3:15 PM | **Coffee Break** | | |
| 3:15 – 4:00 PM | **Transformative Ownership: How Fenway Sports Group's Vision & Strategy Broke the Curse of the Bambino and Solidified Fenway as America's Favorite Ballpark**<br>**Ed Weiss**<br>Executive Vice President / Corporate Strategy & General Counsel<br>Fenway Sports Group | | |
| 4:00 – 5:30 PM | **Closing Remarks Followed by Cocktails** | | |