FIDUCIARY INVESTMENT ADVISORS

2017 Client Conference Agenda

June 23, 2017

TIME	
7:45 – 8:15 AM	**Registration & Continental Breakfast**
8:15 – 8:45 AM	***FIA Welcome & State of the Firm*** **Mark Wetzel**, President **Michael Goss**, Executive Vice President
8:45 – 9:00 AM	***Welcome to Newport*** **Captain Mike Doherty, USN** Commanding Officer, Naval Academy Preparatory School Naval War College, Newport, RI
9:00 – 10:00 AM	***Macroeconomic Update*** **Rick Rieder** Global Chief Investment Officer of Fixed Income, BlackRock
10:00 – 10:10 AM	**10 Minute Break**
10:10 – 10:55 AM	***Managing Risk*** **Pablo Martinez** Head of Cyber Operations, Enterprise Cybersecurity, Fidelity Investments
10:55 – 11:40 AM	***A View from the Hill*** **Joann Flaminio** VP Policy, Fidelity Investments
11:40 – 12:25 PM	***The Keys to Being Heard in the 21st Century*** **Dean Brenner** President, The Latimer Group

12:25 – 1:25 PM	**Lunch** Waterfront Pavilion Overlooking Newport Harbor

1:25 – 2:25 PM	**Optimizing Your Retirement Plan with Financial Wellness Best Practices**	**Diversifying Asset Classes: Recent Results and Future Outlook**	**Managing Your Pension: New Design Considerations for Defined Benefit and Cash Balance Plan Sponsors**
	Sean Jordan VP, Participant Development MassMutual Workplace Solutions **Mary Legg, CEBS, CFP®, CRC®** Financial Educator Fiduciary Investment Advisors *Moderator:* **Karen Paulson** Managing Partner & Sr. Consultant	**Jim Dunn** Chief Investment Officer Wake Forest University / Verger Capital **Michael Chase** Partner & Senior Consultant Fiduciary Investment Advisors	**Raymond O. Aguilera** Partner October Three Consulting LLC **Jeff Stevenson** President & CEO October Three Consulting LLC *Moderator:* **Kevin O'Brien, CFA** Senior Consultant

2:25 – 3:25 PM	**Adding Value Through Investment Manager Selection**	**Keeping Your Defined Contribution Plan Afloat in a Sea of Litigation**
	Matthew Kaminski, CFA Partner & Director, Manager Research Fiduciary Investment Advisors **Robert Lowry, CFA** Senior Research Analyst Fiduciary Investment Advisors **Andrea McAndrew, CFA** Research Analyst Fiduciary Investment Advisors *Moderator:* **Anthony Tranghese, CFA** Managing Partner & Senior Consultant	**Bruce Barth** Partner Robinson & Cole **Ryan Gardner** Managing Partner & Senior Consultant Fiduciary Investment Advisors **David Guadagnoli** Partner Sullivan & Worcester *Moderator:* **Vincent Smith** Partner & Senior Consultant

3:25 – 4:30 PM	**Cocktails**