

## Peter T. Paul Financial Policy Center

### The 5th Annual Capital Markets and Investment Bank Symposium

November 2, 2018

#### Morning Session (location: Paul College G45)

10:00 - 11:30	<p>Stock Pitch Competition Final Round</p> <p>Judges include alums and professionals from Stifel Financial Corp.; Rye Global Investors; Morgan Stanley Wealth Management; Advantage Capital; Lillian Montalto Signatures Properties; TD Bank; UBS Financial Services; Merrion Securities; Natixis Asset Management, etc.</p>
11:30 - 11:45	Break
11:45 - 12:15	Lunch
12:15 - 1:30	<p>1. Presentations by Peter T. Paul Financial Policy Center and the ACFI Department</p> <p>2. Keynote Speech by Mr. Gary Dunchus '82, Managing Director, Merrion Securities LLC</p> <p>3. Awards Ceremony</p>

1:30 - 2:15 Break and Networking

#### Afternoon Session (location: Paul College G25, G45 and 235)

	Room 1 (Paul College G25)	Room 2 (Paul College G45)	Room 3 (Paul College 235)
2:15 - 2:45	Atkins presentation: Equity Sectors	Atkins presentation: Overall Portfolio Strategy, Fixed Income and Alternative Investments	
2:45 - 3:30	<p>Panel A: FinTech</p> <p>Hirak Biswas, Liquidity Edge Andy Bria, Liquidity Edge Jeff Conway, Rye Global Investors</p>	<p>Panel A: Real Estate</p> <p>David Choate, Colliers International Everett Eaton, TD Bank Eric Frahlich, Lillian Montalto Signature Properties</p>	<p>Panel: Sustainability and Investor Responsibility</p> <p>Timothy Coffin, Breckenridge Georges Dyer, Intentional Endowments Network Ryan O'Quinn, Prime Bucholz Fiona Wilson, UNH Center for Social Innovation &amp; Enterprise</p>
3:30 - 3:45	Break	Break	
3:45 - 4:30	<p>Panel B: Trading/ Banking/ Private Equity</p> <p>Gary Dunchus, Merrion Securities Joe Ferraro, Advantage Capital Beth Scarborough, GE Capital International</p>	<p>Panel B: Private Wealth/ Asset Management</p> <p>Paul Anderson, Natixis Asset Management Jim Egan, Stifel Financial Corp. Gordon Greer, UBS Financial Services Scott Sorensen, Vigilant Capital Management</p>	
4:30 - 5:00	Closing comment and Networking	Closing comment and Networking	