SESSIONS
DAY ONE - 10/02/2019

Inside ETFs

February 10 - 13, 2019
Diplomat Beach Resort
Hollywood, Florida

ETFs 101: Facts & Fiction – How ETFs Really Work & What Matters Most

2:00pm - 2:30pm
ETF University & Advisor Accelerator - Location: Regency Ballroom

Exchange-traded funds have transformed the investment landscape, playing a key role in any investment strategy. The beauty of the ETF is just how simple it truly is to use, yet there are nuanced differences that can't be ignored. Matt Hougan and Todd Rosenbluth return to the ETF University stage to highlight these differences, leaving you with a framework to pick the right ETF every time.

Participants

Presenter: Matt Hougan - Chairman, Inside ETFs

Presenter: Todd Rosenbluth - Sr. Director, ETF & Mutual Fund Research, CFRA

The ETF Rule: SEC Update & Practicalities of the Rule

2:00pm - 2:40pm
The ETF Industry Summit - Location: Atlantic Ballroom

The ETF Rule is a game-changer for the ETF industry. But what does it really mean, what did the comment period elicit and what is the regulatory outlook?

Participants

Moderator: Jane Heinrichs - Associate General Counsel, Investment Company Institute

Panelist: Melissa Gainor - Senior Special Counsel, Division of Investment Management, U.S. Securities & Exchange Commission

Panelist: Michael Mundt - Partner, Stradley Ronon

ETFs 201: Don't Leave Money on the Table – A Practical Guide to Trading ETFs

2:30pm - 2:50pm
ETF University & Advisor Accelerator - Location: Regency Ballroom

How investors trade ETFs has changed dramatically over the past decade, and with so many ETFs on the market, can often be tricky. In this session, we sit down with a leading capital markets specialist to ask tough questions and get you real answers on how volatility impacts ETFs, why fixed-income ETFs are liquid when bonds are not, and show you how to avoid leaving money on the table.

Participants

Moderator: Tom Lydon - Editor & Publisher, ETF Trends

Presenter: Ryan Szakacs - Executive Director, ETF Capital Markets, J.P. Morgan Asset Management

So, You Want to Launch an ETF?

2:40pm - 3:30pm
The ETF Industry Summit - Location: Atlantic Ballroom

Our panel of experts will explore what you need to know before you launch your ETF. We'll outline the discuss allocating your budget and creating your business plan to setting your distribution and marketing strategies. We'll also look at approaches to launching for acquisition.

Participants

Moderator: Chris Sullivan - President, MacMillan Communications

Panelist: Edward Baer - Counsel, Ropes & Gray

Panelist: Mike Cronan - President, ETC Marketing Services

Panelist: Stacy Fuller - Partner, K&L Gates

Panelist: Charles Ragauss - Managing Director, Exponential ETFs

ETFs 301: The Evolution of Portfolio Construction Practices: A Smarter Approach to Factor Investing

2:50pm - 3:10pm
ETF University & Advisor Accelerator - Location: Regency Ballroom

"Because it's always been done that way" is hardly an investment philosophy. Multifactor ETFs may offer investors an opportunity to update their approach and more efficiently solve age-old asset allocation challenges. Choosing the right factor ETFs to invest in largely depends on your goals and timelines. Join our factor expert as he provides tips on how to put these innovative tools to work and capture better risk-adjusted returns.

Participants

Presenter: Brian Kraus - Managing Director, Investment Consulting, Hartford Funds

ETFs 401: Bond ETFs Explained – What You Need to Know to Be a Better Investor

3:10pm - 3:30pm
ETF University & Advisor Accelerator - Location: Regency Ballroom

Bond ETFs have become the default tool for sophisticated investors responding to a rapidly changing fixed-income market. Learn how to use these ETFs to better manage duration, yield and credit quality without having to sacrifice liquidity.

Participants

Moderator: MacKenzie Gilmore - Sr. ETF Segment Marketer, Principal Global Investors

Presenter: Paul Kim - Managing Director - ETF Strategy, Principal Global Investors

Networking Break

3:30pm - 4:00pm
ETF University & Advisor Accelerator - Location: Regency Ballroom

Networking break

3:30pm - 4:00pm
The ETF Industry Summit - Location: Atlantic Ballroom

Differentiating Your Practice: Anatomy of a Recession: Recognizing & Preparing for Risk

4:00pm - 4:30pm
ETF University & Advisor Accelerator - Location: Regency Ballroom

Being an advisor isn't easy, even during a 10-year bull market. Imagine how hard it will be the next time we have a "market event." What steps can you take now to prepare your clients for the inevitable, keep them invested and stop them from driving you crazy, and themselves broke?

Participants

Presenter: Corey Hardie - VP, Portfolio Specialist, ClearBridge Investments, a Legg Mason Company

Advertising 2.0: Optimize Your Public Relations in the Digital Age

4:00pm - 4:20pm
The ETF Industry Summit - Location: Atlantic Ballroom

What do you need to focus on post-launch? The panel will look at setting your communications strategy by engaging traditional and social media to maximize marketing and PR today.

Participants

Moderator: Joe Anthony - President, Gregory FCA

Panelist: Eric Balchunas - ETF Analyst, Bloomberg Intelligence

Panelist: Christian Magoon - Founder & CEO, Amplify ETFs

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Global ETF Expansion: Successful Strategies for Launching Across Europe & Asia

4:20pm - 5:00pm
The ETF Industry Summit - Location: Atlantic Ballroom

Understand the global ETF landscape, current regulatory environment and what it takes to launch your product in Europe, as well as penetrating the Asian market through a European platform. We'll look at how exchanges around the world are working together in the current competitive climate.

Participants

Moderator: Malik Sarwar - CEO, K2 Leaders Inc. NY

Panelist: Jorge Fernandez Revilla - Partner, ETF EMEA Lead, KPMG Ireland

Panelist: Brian Higgins - Partner, Dillon Eustace

Panelist: Gareth Myburgh - EMEA ETF Product, Citi

Panelist: Brian Roberts - SVP, Head of Exchange Traded Products, HKEX

Differentiating Your Practice: Winning Clients With Content

4:30pm - 5:00pm
ETF University & Advisor Accelerator - Location: Regency Ballroom

Content marketing has been around since cavemen started selling fire, but the rising cost of client acquisition has sent advisors looking for alternatives. In this critical session, learn how to publish your own content, drive traffic, and make your content compelling enough to attract the right clients.

Participants

Presenter: Kali Roberge - Founder, Creative Advisor Marketing

Keynote: Building a Planning Practice for the 21st Century

5:00pm - 5:30pm
ETF University & Advisor Accelerator - Location: Regency Ballroom

He's seen it all over the course of his career, building a practice that will stand the test of time, yet he's never satisfied. Hear from a perennial Barron's top 100 advisor on how he stays relevant, finds new ways to hypercharge growth in his firm, and why you and your business might be his next big client.

Participants

Presenter: Ric Edelman - Founder & Chairman, Financial Education & Client Experience, Edelman Financial Engines

Keynote: How to build a business around zero

5:00pm - 5:30pm
The ETF Industry Summit - Location: Atlantic Ballroom

Fee compression is causing a negative ripple effect on the industry, but there are also those thriving on the race to zero through specific marketing and growth strategies. Gain insight on how one of the most innovative companies is ushering a new generation into the stock market and beyond.

After the session, attendees are invited to join the ETF University & Advisor Accelerator for the Inside ETFs Political Keynote Address in the Regency Ballroom.

Participants

Interviewee: Ed Robinson - President and Co-Founder, STASH

Interviewer: John Swolfs - CEO, Inside ETFs

Inside ETFs Keynote Address: Beyond Trump Nation - The Future of Politics

5:30pm - 6:00pm
ETF University & Advisor Accelerator - Location: Regency Ballroom

In his first two years in office, President Trump has upended the traditional political order and redefined the long-standing power structure. What does the world look like as we approach the 2020 presidential race, and how will that election affect our country, our markets and our future? Former DNC and RNC Chairs Donna Brazile and Michael Steele join forces to offer an in-depth analysis of the American political landscape and what comes next.

Participants

Presenter: Donna Brazile - Political Strategist & Former Chair of the Democratic National Committee (DNC), --

Moderator: Matt Hougan - Chairman, Inside ETFs

Presenter: Michael Steele - Former Chairman of the Republican National Committee (RNC), --

The Inside ETFs 'Welcome to Florida' Cocktail Reception

6:00pm - 7:30pm

Join us at the Diplomat's iconic "The Hotel Bar" in the open-air lobby for a high-energy indoor/outdoor networking reception that will get your conference off to the right start.

Music Provided by DJ Stochastic

SCHEDULE

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TIME	ETF UNIVERSITY & ADVISOR ACCELERATOR - LOCATION: REGENCY BALLROOM	THE ETF INDUSTRY SUMMIT - LOCATION: ATLANTIC BALLROOM
2:00PM	**2:00pm** - ETFs 101: Facts & Fiction – How ETFs Really Work & What Matters Most **2:30pm** - ETFs 201: Don't Leave Money on the Table – A Practical Guide to Trading ETFs **2:50pm** - ETFs 301: The Evolution of Portfolio Construction Practices: A Smarter Approach to Factor Investing	**2:00pm** - The ETF Rule: SEC Update & Practicalities of the Rule **2:40pm** - So, You Want to Launch an ETF?
3:00PM	**3:10pm** - ETFs 401: Bond ETFs Explained – What You Need to Know to Be a Better Investor **3:30pm** - Networking Break	**3:30pm** - Networking break
4:00PM	**4:00pm** - Differentiating Your Practice: Anatomy of a Recession: Recognizing & Preparing for Risk **4:30pm** - Differentiating Your Practice: Winning Clients With Content	**4:00pm** - Advertising 2.0: Optimize Your Public Relations in the Digital Age **4:20pm** - Global ETF Expansion: Successful Strategies for Launching Across Europe & Asia
5:00PM	**5:00pm** - Keynote: Building a Planning Practice for the 21st Century **5:30pm** - Inside ETFs Keynote Address: Beyond Trump Nation - The Future of Politics	**5:00pm** - Keynote: How to build a business around zero
6:00PM	**6:00pm** - The Inside ETFs 'Welcome to Florida' Cocktail Reception	**6:00pm** - The Inside ETFs 'Welcome to Florida' Cocktail Reception

SESSIONS
DAY TWO - 11/02/2019

Breakfast Workshop: Women in ETFs

7:00am - 8:30am
Breakfast Workshop 1 - Location: Atlantic 1

Please join Women in ETFs for its 6th Annual Inside ETFs Breakfast, where we will host a distinguished panel of women leaders for a discussion focused on career evolution in a dynamic marketplace.

Pre-registration required.

Register Here!

Participants

Panelist: Jodie Gunzberg - Managing Director, Head of U.S. Equities, S&P Dow Jones Indices

Panelist: Anu Jayanti - Global Head of Relationship Management, Citi's Global Institutional Client Group

Panelist: Linda Riefler - Board of Directors, MSCI

Breakfast Workshop: Back to Basics, Thematic ETFs & the 2019 Outlook

7:00am - 8:50am
Breakfast Workshop 2 - Location: Regency 2

Sometimes the best way to get ahead is by going back to basics. Join Exchange Traded Concepts and its clients for a breakfast workshop like no other. We'll explore topics like forgotten gold and why it should have a place in your portfolio, why fundamental research works in an index, why Cushing MLPs within sector funds make sense, and trading ETFs do's and don'ts. Leave with a better understanding of these niche products and where the opportunities lie in the year ahead.

Participants

Moderator: Mike Cronan - President, ETC Marketing Services

Panelist: Richard Cea - Head of Exchange Traded Products, UBS

Panelist: Jerry Hicks - Sales & Business Development Manager, The Perth Mint

Panelist: Todd Sunderland - Partner, Head of Risk Management, Head of Quant Strategies, Cushing Asset Management

Welcome to Inside ETFs 2019

9:00am - 9:05am
Main Session

Participants

Presenter: John Swolfs - CEO, Inside ETFs

Chairperson Remarks

9:05am - 9:10am
Main Session

Participants

Presenter: Thomas Rampulla - Managing Director, Financial Advisor Services, Vanguard

Opening Keynote Address: The Uncertainty Advantage – Finding Value in Tumultuous Times

9:10am - 9:40am
Main Session

Today's market and economic pressures present investors with more questions than answers. Join Vanguard's CIO and bond expert Greg Davis as he shares his perspective on the current fixed-income environment, ETFs' untapped potential, and opportunities to uncover hidden value in your clients' portfolios.

Participants

Presenter: Gregory Davis - CIO, Vanguard

The Future of ETFs: The Business Leaders Panel

9:40am - 10:30am
Main Session

The ETF industry has turned into a dogfight, with the race to zero accelerating as each issuer offers ever-cheaper alternatives. An annual tradition, Inside ETFs gathers the goliaths of the ETF universe for a candid discussion on the future of ETFs, where the next leg of growth will come from and what areas of the industry are ripe for disruption.

Participants

Moderator: Robin Wigglesworth - US Markets Editor, Financial Times

Panelist: Sanjay Arya - Head of Indexes, Morningstar

Panelist: Rodney Comegys - Global Head of Equity Investment, Equity Investment Group, Vanguard

Panelist: Jamie Farmer - Chief Commercial Officer, S&P Dow Jones Indices

Panelist: Dave Gedeon - VP Product Manager, Nasdaq Global Information Services

Panelist: Rory Tobin - Head of the Global SPDR® ETF Business, State Street Global Advisors

The State of the ETF Union 2019: The Dawn of Mass Personalization

10:30am - 11:00am
Main Session

Dave Nadig and Matt Hougan think today is a massive turning point in the history of investing. Don't miss their vision of where the ETF and advisory industries are heading, and how you should adapt your business to suit.

Participants

Presenter: Matt Hougan - Chairman, Inside ETFs

Presenter: Dave Nadig - Managing Director, ETF.com

Networking Break

11:00am - 11:30am
Main Session

Trade Wars, Brexit & the Ocean of Debt: Global Equities Explored

11:30am - 12:20pm
Main Session

The White House placed tariffs on over $500 billion of imports from China. Two and a half years later, Brexit remains a chaotic unknown, Italy is on the verge of another economic collapse, and there's more global debt now than before the financial crisis. How are investors to navigate these global land mines? We've pulled together the smartest global thinkers we know to help survey the field.

Participants

Moderator: Bob Pisani - 'On-Air Stocks' Editor, CNBC

Panelist: Brendan Ahern - CIO, KraneShares

Panelist: Mary Ann Bartels - CIO Bank of America Merrill Lynch

Panelist: Todd Jablonski - CIO, Principal Portfolio Strategies

Panelist: Gene Podkaminer - SVP, Head of Multi-Asset Research Strategies, Franklin Templeton Multi-Asset Solutions, Franklin Templeton Investments

Panelist: Jurrien Timmer - Director of Global Macro, Fidelity Investments

History in the Making: A Conversation With Stacey Cunningham

12:20pm - 12:40pm
Main Session

For the first time in the 226 years since the Buttonwood Agreement, a woman is calling the shots at the world's largest stock exchange. Hear Stacey Cunningham share her thoughts on the future of the global equity market.

Participants

Presenter: Stacey Cunningham - President, NYSE Group

Moderator: Matt Hougan - Chairman, Inside ETFs

Luncheon Keynote Session: Inside the Mind of Disruption

12:40pm - 1:50pm

The terms "innovative" and "disruptive" have become commonplace, with every new startup claiming it's going to change the world. Inside ETFs and State Street Global Advisors sit down with a true game-changer to let you know what it really takes to be disruptive.

Participants

Presenter: Julie Rice - Entrepreneur, Co-Founder, SoulCycle

Introduction: Sue Thompson - Head of SPDR® Americas Distribution, State Street Global Advisors

Everything You Need to Know: Is Now the Time for Active Equity ETFs?

2:00pm - 2:50pm
Track A - Location: Regency 1

Flows into active ETFs are picking up, and the products offer investors real solutions. But skeptics remain. Are regulatory issues and concerns about front-running real, or are they grounded in fear? Hear from managers as well as investors who are living and breathing this fight every day.

Participants

Moderator: David Armstrong - Executive Director, Content & User Engagement, Wealthmanagement.com

Panelist: Noah Hamman - CEO, AdvisorShares

Panelist: Dodd Kittsley - Director, Davis Advisors

Panelist: John Lunt - President, Lunt Capital Management, Inc.

Panelist: Shana Sissel - Portfolio Manager, CLS Investments

Everything You Need to Know: Dividend & Income Investing

2:00pm - 2:50pm
Track B - Location: Regency 2

As your clients enter retirement, the need for income increases. While rate increases make traditional bonds more attractive, what's the best approach for extracting income from the markets today? This panel looks at outcome/covered-call-type strategies, MLPs and alternatives to bonds, from dividend strategies to alternative asset classes and derivatives-based approaches.

Participants

Moderator: Carolina Wilson - Journalist, Bloomberg News

Panelist: Kenny Feng - President & CEO, Alerian

Panelist: Joe Kairen - Sr. Director, Strategy & Volatility Indices, S&P Dow Jones Indices

Panelist: Edward Kerschner - Chief Portfolio Strategist, Columbia Threadneedle Investments

Panelist: Francis Rodilosso - Head of Fixed Income ETF Portfolio Management, VanEck

Everything You Need to Know: The Thematic Crystal Ball

2:00pm - 2:50pm
Track C - Location: Regency 3

Don't blink—you might miss the next hot new thematic ETF! Investors have been using niche ETFs as a source of outperformance and diversification, but how do you know the difference between a trend and a fad? This session will help you separate signal from noise.

Participants

Moderator: Lara Crigger - Sr. Staff Writer, ETF.com

Panelist: Rochelle (Shelly) Antoniewicz - Sr. Director of Industry & Financial Analysis, Investment Company Institute

Panelist: Matthew Bartolini - Head of SPDR® Americas Research, State Street Global Advisors

Panelist: Paul Dellaquila - Global Head of ETFs, Defiance ETFs

Panelist: Jay Jacobs - SVP, Head of Research & Strategy, Global X

Everything You Need to Know: Commodities for the Year Ahead

2:00pm - 2:50pm
Track D - Location: Atlantic 3

Hard assets promise to be that ephemeral counter-correlated asset that zigs when your portfolio zags. In any given year, that can make or break your portfolio. So how do you identify which commodity is poised to explode in 2019? Hear from our panel of industry insiders as they discuss the road ahead for this complex but critical asset class.

Participants

Moderator: Sumit Roy - Analyst, ETF.com

Panelist: Jared Dillian - Editor, The Daily Dirtnap

Panelist: John Graves - Author: Fracking, America's Alternative Energy Revolution, The Renaissance Group

Panelist: Paul Nolte - SVP, Portfolio Manager, Kingsview Asset Management

Panelist: Adam Perlaky - Manager of Investment Research, World Gold Council

Everything You Need to Know: Cryptocurrency & ETFs

2:00pm - 2:50pm
Track E - Location: Atlantic 2

Bitcoin and other cryptocurrencies clearly pose a threat to the status quo. But the SEC continues to reject the launch of a bitcoin ETF. Why? We sit down with the industry's leading minds to learn the pros and cons of owning cryptocurrencies, how to detect fraud, and if 2019 will finally be the year for the first U.S. cryptocurrency ETF launch.

Participants

Moderator: Drew Voros - Editor-in-Chief, ETF.com

Panelist: Hunter Horsley - CEO, Bitwise Asset Management

Panelist: Hany Rashwan - CEO, Amun AG

Panelist: Tyrone Ross Jr. - Managing Partner, Noble Bridge Wealth Management

Panelist: Jeremy Senderowicz - Partner, Dechert LLP

How Service Providers Can Help ETFs Maximize Efficiency

2:00pm - 2:50pm
Peer To Peer Track - Location: Atlantic 1

The “race to zero” has affected every part of the ETF ecosystem. But what role does a service provider play in allowing ETFs to maximize efficiency with increasing competitiveness between ETF issuers? What can be done in the short term to reduce impact? What future technology enhancements could enable service providers—and ultimately ETFs—to operate more efficiently? In this unique session, we are joined by the leaders in the custody and fund services space for a frank conversation on how they’re rising to meet the challenges and what that means for the industry.

Participants

Moderator: Brenton Garen - Editor-in-Chief, ETF Trends

Panelist: Dominic Crowe - Managing Director, Global Head of Product Development, Custody & Fund Services, Citi

Panelist: Jeffrey Sardinha - VP, State Street Global Services

Panelist: Keith Slattery - Managing Director & Global Head of Traditional Fund Accounting, J.P. Morgan

How to Improve Your ETF Due Diligence for Better Investment Outcomes

2:50pm - 3:40pm
Track A - Location: Regency 1

No more “easy” buttons: Too many investors focus on expense ratios and size when picking an ETF. These matter; but are they the most important determinants of your success? We’ll find out. Inside ETFs invites you to join the conversation on how to analyze and choose an ETF beyond the obvious.

Participants

Moderator: Lois Gregson - Financial Advisor, Fiduciary Advisors

Panelist: Kevin DiSano - Sr. Managing Director, Head of ETF Sales, Nuveen

Panelist: Michael Natale - Head of Intermediary Distribution, Northern Trust Asset Management

Panelist: Ed Nini - Head of Investment Marketing and Strategy, Beta Solutions, OppenheimerFunds

Panelist: D.J. Tierney - Sr. Client Portfolio Strategist, Charles Schwab Investment Management

How to Distinguish Between Value Play and Value Trap: Emerging Market

2:50pm - 3:40pm
Track B - Location: Regency 2

2018 was a rough year for emerging market ETFs. With no sign of trade wars ending, does this once-powerhouse of returns still make sense in an asset allocation? Get firsthand insight into where the growth will come from, and how to tiptoe around the landmines in this increasingly complex market.

Participants

Moderator: Linda Zhang - CEO, Purview Investments

Panelist: Joseph Barrato - CEO, Arrow Funds

Panelist: David Garff - President, Accuvest Global Advisors

Panelist: Jay Pelosky - CIO & Co-Founder, TPW Investment Management

Panelist: Jonathan Shelon - COO, KraneShares

How to Use Alternative ETF Strategies

2:50pm - 3:40pm
Track C - Location: Regency 3

The idea that alternative strategies are only for the biggest and most sophisticated investors is a fallacy. As the next generation of alternative ETFs comes to market, it’s easier than ever to access new asset classes and new patterns of return. But how do you find them, and how do you use them without making rookie mistakes? Let our panel of experts be your guide to the world of alternative investing.

Participants

Moderator: Nate Geraci - President, The ETF Store, Inc.

Panelist: Sal Bruno - CIO, IndexIQ by New York Life Investments

Panelist: Nancy Davis - Managing Partner & CIO, Quadratic Capital Management LLC

Panelist: Alistair Lowe - Managing Director & Sr. Portfolio Manager, Beta Strategies, J.P. Morgan Asset Management

Panelist: Jeremy Schwartz - Global Head of Research, WisdomTree

How to Capture Outperformance & Manage Risk

2:50pm - 3:40pm
Track D - Location: Atlantic 3

The bull market continues to push higher, and shows no immediate sign of reversing. How do you find alpha while still controlling risk? In this in-depth session, we share real-world examples of how to position a portfolio for upside participation without exposing yourself to hidden risks.

Participants

Moderator: Michael Batnick - Director of Research, Ritholtz Wealth Management

Panelist: Bill DeRoche - CIO & Portfolio Manager, AGFiQ

Panelist: Patrick Gelshenen - Executive Director, TOBAM

Panelist: Chris Mirrione - Sr. Portfolio Manager, Alesco Advisors

Panelist: Joel Shulman - Professor of Entrepreneurship, Babson College

How to Trade ETFs: Insights From Across the Ecosystem

2:50pm - 3:40pm
Track E - Location: Atlantic 2

Stories of monster trades dominate the headlines, along with the occasional horror stories of trades gone wrong and HFT histrionics. But what if you’re neither a giant institution nor a 100-share investor? How do you ensure you’re getting the best execution, trade after trade, day after day? In this peer-to-peer session, we invite real ETF traders to share their best practices to make you a better ETF trader.

Participants

Moderator: Eric Balchunas - ETF Analyst, Bloomberg Intelligence

Panelist: Chris Heyman - Trading & Operations, Accuvest Global Advisors

Panelist: Bryan Novak - Sr. Managing Director, Astor Investment Management LLC

Panelist: Edward Rossetti - Head of US ETF Trading, Goldman Sachs

Panelist: Will Wall - Manager of Trading & Operations, RiverFront Investment Group

SESSIONS

DAY TWO - 11/02/2019

Effectively Transfer Wealth & Retain Assets

2:50pm - 3:40pm
Peer To Peer Track - Location: Atlantic 1

With $30 trillion flowing down from the previous generation, our experts guide you through how to prepare for the inevitable shift. Are you prepared to move accounts from cash-and-drawdown mode to post-inheritance planning? Advisors who are will not only retain but grow their client base.

Participants

Moderator: Rick Ferri - Financial Analyst, Investment Adviser, Industry Consultant, Author, Speaker & Entrepreneur, Rickferri.com

Panelist: Justin Castelli - CEO & Financial Advisor, RLS Wealth Management

Panelist: Brendan Mullooly - Financial Advisor, Mullooly Asset Management, Inc.

Panelist: Malik Sarwar - CEO, K2 Leaders Inc. NY

Panelist: Jennifer Wappaus - Director, Family Wealth Advisor, PagnatoKarp

Networking Break

3:40pm - 4:10pm

Looking for Returns? Ask the American Public!

4:10pm - 4:50pm
Main Session

What if a compelling, undiscovered source of alpha were hiding in plain sight, and identified not by Wall Street, but by the citizens of Main Street? Hear from hedge fund legend Paul Tudor Jones on why he co-founded nonprofit JUST Capital, and how its research, rankings and indexes are demonstrating the case for aligning the priorities of Wall Street with the values and priorities of the American public.

Participants

Presenter: Paul Tudor Jones II - Co-Founder & Chairman, JUST Capital

Back to the Mine: Hidden Gems 2.0

4:50pm - 5:30pm
Main Session

Back by popular demand … Inside ETFs invites our 12 hidden gems to present their best ideas in a rapid-fire segment that will leave you with fresh ideas for your portfolios.

- **DTEC** - Andy Hicks, SVP, Director of Portfolio Management & Research, ALPS Advisors
- **ONLN** - Simeon Hyman, Global Investment Strategist, ProShares
- **ULBR** - Dan Aronson, Director, Janus Henderson Group
- **BOCT, POCT, UOCT** - Bruce Bond, Co-Founder & CEO, Innovator Capital Management
- **PRID** - Richard Cea, Head of Exchange-Traded Products, UBS
- **JPBG** - Matthew Riley, ETF Sales Specialist, J.P. Morgan Asset Management
- **DINT** - Dodd Kittsley, Director, Davis Advisors
- **RVRS** - Phil Bak, Founder & CEO, Exponential ETFs
- **PUTW** - Jeremy Schwartz, Global Head of Research, WisdomTree
- **FLQL** - Dan Muzzarelli, VP, Institutional ETF Business Development, Franklin Templeton
- **KLDW** - Steven Vannelli, CEO & CIO, Knowledge Leaders Capital
- **COMB** - William Rhind, CEO, GraniteShares

Participants

Presenter: Dan Aronson - Director, Janus Henderson Group

Presenter: Phil Bak - Founder & CEO, Exponential ETFs

Presenter: Bruce Bond - Co-Founder & CEO, Innovator Capital Management

Presenter: Richard Cea - Head of Exchange Traded Products, UBS

Presenter: Andy Hicks - SVP, Director of Portfolio Management & Research, ALPS Advisors, Inc.

Presenter: Simeon Hyman - Global Investment Strategist, ProShares

Presenter: Dodd Kittsley - Director, Davis Advisors

Presenter: Dan Muzzarelli - VP, Institutional ETF Business Development, Franklin Templeton Investments

Presenter: William Rhind - Founder & CEO, GraniteShares

Presenter: Matthew Riley - ETF Sales Specialist, J.P. Morgan Asset Management

Presenter: Jeremy Schwartz - Global Head of Research, WisdomTree

Presenter: Steven Vannelli - CEO & CIO, Knowledge Leaders Capital

Closing Keynote Address: An Evening With Michael Lewis

5:30pm - 6:00pm
Main Session

A sharp wit who has dedicated his career to observing politics, finance and the evolution of American culture, Michael Lewis is one of the country's most influential authors and leading social commentators. His best-selling books include "The Big Short," "Liar's Poker," "Moneyball" and the "The Blind Side." Join us as he shares his journey into captivating audiences around the world.

Participants

Presenter: Michael Lewis - Best-Selling Author of The Fifth Risk, Moneyball, The Blind Side, and The Big Short, --

Moderator: Barry Ritholtz - Chairman & CIO, Ritholtz Wealth Management

An Evening on the Water: Starlight Cruise & Networking Reception

6:00pm - 7:30pm

An Inside ETFs tradition returns! This sparkling networking reception combines two parties in one: Relax by Florida's Intracoastal Waterway at the hotel's swanky Portico beer garden, or board our state-of-the-art 111-foot yacht and cruise the beautiful coastline of South Florida, cocktail in hand.

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TIME	BREAKFAST WORKSHOP 1 - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 2 - LOCATION: REGENCY 2	MAIN SESSION	PEER TO PEER TRACK - LOCATION: ATLANTIC 1	TRACK A - LOCATION: REGENCY 1	TRACK B - LOCATION: REGENCY 2	TRACK C - LOCATION: REGENCY 3	TRACK D - LOCATION: ATLANTIC 3	TRACK E - LOCATION: ATLANTIC 2
7:00AM	**7:00am** - Breakfast Workshop: Women in ETFs	**7:00am** - Breakfast Workshop: Back to Basics, Thematic ETFs & the 2019 Outlook							
8:00AM									
9:00AM			**9:00am** - Welcome to Inside ETFs 2019 **9:05am** - Chairperson Remarks **9:10am** - Opening Keynote Address: The Uncertainty Advantage – Finding Value in Tumultuous Times **9:40am** - The Future of ETFs: The Business Leaders Panel						
10:00AM			**10:30am** - The State of the ETF Union 2019: The Dawn of Mass Personalization						

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Diplomat Beach Resort
Hollywood, Florida

TIME	BREAKFAST WORKSHOP 1 - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 2 - LOCATION: REGENCY 2	MAIN SESSION	PEER TO PEER TRACK - LOCATION: ATLANTIC 1	TRACK A - LOCATION: REGENCY 1	TRACK B - LOCATION: REGENCY 2	TRACK C - LOCATION: REGENCY 3	TRACK D - LOCATION: ATLANTIC 3	TRACK E - LOCATION: ATLANTIC 2
11:00AM			**11:00am** - Networking Break **11:30am** - Trade Wars, Brexit & the Ocean of Debt: Global Equities Explored						
12:00PM	**12:40pm** - Luncheon Keynote Session: Inside the Mind of Disruption	**12:40pm** - Luncheon Keynote Session: Inside the Mind of Disruption	**12:20pm** - History in the Making: A Conversation With Stacey Cunningham **12:40pm** - Luncheon Keynote Session: Inside the Mind of Disruption	**12:40pm** - Luncheon Keynote Session: Inside the Mind of Disruption	**12:40pm** - Luncheon Keynote Session: Inside the Mind of Disruption	**12:40pm** - Luncheon Keynote Session: Inside the Mind of Disruption	**12:40pm** - Luncheon Keynote Session: Inside the Mind of Disruption	**12:40pm** - Luncheon Keynote Session: Inside the Mind of Disruption	**12:40pm** - Luncheon Keynote Session: Inside the Mind of Disruption
1:00PM									
2:00PM				**2:00pm** - How Service Providers Can Help ETFs Maximize Efficiency **2:50pm** - Effectively Transfer Wealth & Retain Assets	**2:00pm** - Everything You Need to Know: Is Now the Time for Active Equity ETFs? **2:50pm** - How to Improve Your ETF Due Diligence for Better Investment Outcomes	**2:00pm** - Everything You Need to Know: Dividend & Income Investing **2:50pm** - How to Distinguish Between Value Play and Value Trap: Emerging Market	**2:00pm** - Everything You Need to Know: The Thematic Crystal Ball **2:50pm** - How to Use Alternative ETF Strategies	**2:00pm** - Everything You Need to Know: Commodities for the Year Ahead **2:50pm** - How to Capture Outperformance & Manage Risk	**2:00pm** - Everything You Need to Know: Cryptocurrency & ETFs **2:50pm** - How to Trade ETFs: Insights From Across the Ecosystem

SCHEDULE

DAY TWO - 11/02/2019

Inside ETFs

February 10 - 13, 2019
Diplomat Beach Resort
Hollywood, Florida

TIME	BREAKFAST WORKSHOP 1 - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 2 - LOCATION: REGENCY 2	MAIN SESSION	PEER TO PEER TRACK - LOCATION: ATLANTIC 1	TRACK A - LOCATION: REGENCY 1	TRACK B - LOCATION: REGENCY 2	TRACK C - LOCATION: REGENCY 3	TRACK D - LOCATION: ATLANTIC 3	TRACK E - LOCATION: ATLANTIC 2
3:00PM	**3:40pm** - Networking Break	**3:40pm** - Networking Break	**3:40pm** - Networking Break	**3:40pm** - Networking Break	**3:40pm** - Networking Break	**3:40pm** - Networking Break	**3:40pm** - Networking Break	**3:40pm** - Networking Break	**3:40pm** - Networking Break
4:00PM			**4:10pm** - Looking for Returns? Ask the American Public! **4:50pm** - Back to the Mine: Hidden Gems 2.0						
5:00PM			**5:30pm** - Closing Keynote Address: An Evening With Michael Lewis						
6:00PM	**6:00pm** - An Evening on the Water: Starlight Cruise & Networking Reception	**6:00pm** - An Evening on the Water: Starlight Cruise & Networking Reception	**6:00pm** - An Evening on the Water: Starlight Cruise & Networking Reception	**6:00pm** - An Evening on the Water: Starlight Cruise & Networking Reception	**6:00pm** - An Evening on the Water: Starlight Cruise & Networking Reception	**6:00pm** - An Evening on the Water: Starlight Cruise & Networking Reception	**6:00pm** - An Evening on the Water: Starlight Cruise & Networking Reception	**6:00pm** - An Evening on the Water: Starlight Cruise & Networking Reception	**6:00pm** - An Evening on the Water: Starlight Cruise & Networking Reception

SESSIONS

DAY THREE - 12/02/2019

Inside ETFs

February 10 - 13, 2019
Diplomat Beach Resort
Hollywood, Florida

2nd Annual Inside ETFs Fun-Run

6:30am - 8:00am

It's never too early to get in shape for a good cause! Join us for the 2nd annual Inside ETFs Fun Run, proudly brought to you by John Hancock. All proceeds from this event will benefit the lifesaving work of Save the Children, an international children's relief organization determined to ensure every child around the world has a healthy start, a safe environment and the opportunity to learn.

Special guest: Meb Keflezighi, Olympic Medalist, winner of Boston & New York City marathons and recipient of the Jesse Owens Award

Register Here!

Breakfast Workshop: J.P. Morgan Presents: An exclusive live recording of "In the Know" – What you need to know about ETFs in 2019

8:00am - 8:50am
Breakfast Workshop 1 - Location: Atlantic 1

The investment landscape is evolving rapidly. Each quarter, ETF Trends, J.P. Morgan Asset Management and NYSE have partnered to bring you the current thinking on ETFs with the "In the Know" quarterly series. Join us for an exclusive live recording and Q&A session with the experts.

Participants

Moderator: Tom Lydon - Editor & Publisher, ETF Trends

Panelist: Samantha Azzarello - VP, Global Market Strategist, J.P. Morgan Funds

Panelist: Yasmin Dahya - Executive Director, Head of Americas Investment Specialist Team, Beta Strategies Group, J.P. Morgan Asset Management

Panelist: Douglas Yones - Head of Exchange Traded Products, New York Stock Exchange

Breakfast Workshop: FTSE Russell Presents: Everything Indexing: Roundtable Discussions

8:00am - 8:50am
Breakfast Workshop 2 - Location: Regency 1

FTSE Russell's breakfast session will host a series of roundtables featuring subject matter experts from a variety of ETF issuers, allowing for an insightful and engaging discussion on a range of topics, building a comprehensive overview of everything indexing has to offer.

The Bubble Discussion: Prof. Robert Shiller & DoubleLine Capital's Jeffrey Sherman

9:00am - 9:40am
Main Session

Overheated? Overbought? Or just rolling along? Will rising rates pop the market bubble? Or will the long-term bull market ride the back of tax cuts and deregulation into the sunset? Hear from two of the world's best minds and get the inside scoop on how markets will really react to different events in the coming year.

Participants

Presenter: Robert Shiller - American Economist, best-selling author & Sterling Professor of Economics, Professor of Finance, & Fellow at the International Center for Finance, Yale University

Presenter: Jeffrey Sherman - Deputy CIO, DoubleLine Capital

10 Questions in 20 minutes: Risks & Rewards - A Global Approach

9:40am - 10:00am
Main Session

The return of volatility sent markets spinning, panicked Main Street and set the 24-hour news cycle abuzz. Is this the end of the bull market? Join Dave Nadig as he sits down with Invesco's chief global market strategist to get you the answers you need.

Participants

Moderator: Dave Nadig - Managing Director, ETF.com

Presenter: Kristina Hooper - Chief Global Market Strategist, Invesco

Figuring Out Factors: Strategies for Implementation

10:00am - 10:50am
Main Session

The Inside ETFs 2019 survey has spoken: With over 500 responses, our audience let us know they understand the theory behind factors and smart-beta investing, but just aren't sure how to implement these strategies. We address this question head-on, and provide you, the advisor, with real-world solutions and actionable ideas.

Participants

Moderator: Mark Carver - Executive Director & Global Head of Factor Index Products, MSCI

Panelist: Alessio de Longis - Co-head and Portfolio Manager, Global Multi-Asset Team, OppenheimerFunds

Panelist: Vincent de Martel - Global Solutions Strategist, Invesco

Panelist: Francis Kinniry - Global Head of Portfolio Construction, Investment Strategy Group, Vanguard

Panelist: Theodore Lucas - Head of Investment Strategies & Solutions, Hartford Funds

Panelist: Ed Rosenberg - SVP, Head of ETFs, American Century Investments

Networking Break

10:50am - 11:20am
Main Session

It's All About the Experience: Insights From Joe Duran

11:20am - 11:50am
Main Session

You'd be hard-pressed to find a firm with happier clients than United Capital. In this unique keynote, Joe Duran shows us it's not about how much you do for your clients, but what you do and how you do it. Learn the keys to running a practice built on unmatched customer experience.

Participants

Presenter: Joe Duran - CEO & Founding Partner, United Capital

Fixed Income ETFs: Analyzing the Growing Demand

11:50am - 12:40pm
Main Session

Rates will continue to rise. Just how far is anyone's guess, but is that what really matters? In this hard-hitting panel, we'll examine how to manage a bond portfolio in this increasingly challenging environment using fixed-income ETFs to add flexibility, boost income and stay liquid.

Participants

Moderator: Tom Lydon - Editor & Publisher, ETF Trends

Panelist: Michael Arone - Chief Investment Strategist, SPDR® Americas, State Street Global Advisors

Panelist: William Housey - Sr. Portfolio Manager, First Trust Advisors L.P.

Panelist: Jayni Kosoff - Managing Director, Head of Fixed Income ETF Strategy & Business Development, FTSE Russell

Panelist: Jason Singer - Head of Fixed Income ETFs, Goldman Sachs Asset Management

Panelist: Gene Tannuzzo - Deputy Global Head of Fixed Income, Sr. Portfolio Manager, Columbia Threadneedle Investments

Networking Lunch

12:40pm - 1:50pm

You asked, we listened. Enjoy this time to network with your peers, catch up on emails or visit Inside ETFs partners in the exhibit hall to gain a fresh perspective on the future of investing.

Active Fixed-Income ETFs: For Real?

2:00pm - 2:50pm
Track A - Location: Regency 1

You wouldn't loan your deadbeat uncle more money, yet that's exactly what bond indexes do—they double down on the most indebted. But those days are over. Factor investing and active management have changed the way we think about bond ETFs. Hear how these new approaches offer new alternatives to debt investing.

Participants

Moderator: Elisabeth Kashner - Director of ETF Research, FactSet

Panelist: Jason Bloom - Director of Global Macro ETF Strategy, Invesco

Panelist: Ryan Issakainen - Sr. VP, ETF Strategist, First Trust Advisors L.P.

Panelist: Brian Kelleher - SVP, ETF Strategist, PIMCO

Panelist: Matt Lewis - VP, Head of ETF Implementation & Capital Markets, American Century Investments

The ETF Strategist Round Table - 10 Big Questions

2:00pm - 2:50pm
Track B - Location: Regency 2

Perhaps no group knows the benefits more than ETF strategists. As early adopters of ETFs, they have embraced disruption, remade their business and helped drive the industry forward. We gather the biggest ETF strategists we know to discuss the current state of asset management, what keeps them up at night, and how they're prepping for the inevitable downturn.

Participants

Moderator: Cinthia Murphy - Managing Editor, ETF.com

Panelist: Kevin Blocker - Sr. Portfolio Manager, Horizon Investments

Panelist: Will Geisdorf - ETF Strategist, Ned Davis Research

Panelist: Henry Ma - President & CIO, Julex Capital Management, LLC

Panelist: Dan Suzuki - Portfolio Strategist, Richard Bernstein Advisors LLC

DIY vs. Outsourcing: The Curious Case of Multifactor Strategies

2:00pm - 2:50pm
Track C - Location: Regency 3

Factors are useful, but how you mix value, quality, momentum and other factors is the difference between success and expensive failure. Should you be cooking your own strategy? Or working with a multifactor product or next-gen tools to improve your odds? Hear stories from both sides of the debate.

Participants

Moderator: Ben Johnson - Director of Global ETF & Passive Strategies, Morningstar

Panelist: Cole Feinberg - VP - ETFs, Goldman Sachs Asset Management

Panelist: Arne Noack - Exchange Traded Product Development for the U.S., DWS Distributors, Inc.

Panelist: Gene Podkaminer - SVP, Head of Multi-Asset Research Strategies, Franklin Templeton Multi-Asset Solutions, Franklin Templeton Investments

Panelist: Lukas Smart - Sr. Portfolio Manager & VP, Dimensional Fund Advisors

The New Frontier of Alpha: Robotics, AI & Disruptive Tech Investing

2:00pm - 2:50pm
Track D - Location: Atlantic 3

The world is taking note as robotics, automation and AI are redefining how we live, work and invest. With a future dominated by robots just a grasp away, join our experts as they grease the metal on investment opportunities within these emerging technologies. Find out why they're so bullish in this space.

Participants

Moderator: Tom Psarofagis - ETF Analyst, Bloomberg Intelligence

Panelist: Mike Akins - Founding Partner, ETF Action

Panelist: Eric Biegeleisen - Managing Director, Research, 3EDGE Asset Management

panelist: Adam Butler - CIO, ReSolve Asset Management

Panelist: Jeremie Capron - Head of Research, ROBO Global

The Hedge Fund Approach: The Smart Money in ETFs

2:00pm - 2:50pm
Track E - Location: Atlantic 2

Everyone's looking for an edge—the idea that will help boost returns. We've assembled three world-class hedge fund investors to discuss how they deploy ETFs to capture growth, express unique investment viewpoints, add a tactical tilt and still stay liquid.

Participants

Moderator: John Davi - Founder & CIO, Astoria Portfolio Advisors

Panelist: Michael DePalma - CEO, Sr. Portfolio Manager, Phase Capital LP

Panelist: Garth Friesen - CEO, III Capital Management

Panelist: Kathryn Sweeney - Head of SPDR® Americas Institutional Sales, State Street Global Advisors

Hiring & Firing Investment Managers: What Institutional Investors Look For

2:00pm - 2:50pm
Peer To Peer Track - Location: Atlantic 1

Selection, hiring and firing of managers is the most important part of the investment process, and can often be the difference between taking your business to the next level of growing your assets and profits, or continuing to muddle along. The challenge remains: How do you get noticed by institutions, private wealth and endowments? Join us for a panel led by industry practitioners and CFA Institute experts to learn more about how you can make yourself stand out and become more attractive to institutional investors.

Participants

Moderator: Thomas Porter - Head, CIPM Program, CFA Institute

Panelist: Case Fell - CIO, NYSNA Pension Plan & Benefits Fund

Panelist: Robert Hagstrom - Sr. Portfolio Manager, Equity Compass

Panelist: Edward Landsman - Sr. Investment Consultant, Portfolio Evaluations, Inc.

Panelist: Jim Ulseth - Deputy CIO, WE Family Offices

ETF Spotlight Talk: Not your Advisor's Style Investing

2:50pm - 3:20pm
Track A - Location: Regency 1

Clearly, the traditional style approach is not as focused or precise as pure style indices for tactical and dynamic style tilts. The pure style indices select only the strongest growth and value stocks, excluding those in the middle with weak scores, and reweight the pure style stocks based on the strength of their style score.

Participants

Presenter: Aye Soe - Managing Director, Global Research & Design, S&P Dow Jones Indices

ETF Spotlight Talk: Replicating Active Strategies Using ETFs

2:50pm - 3:20pm
Track B - Location: Regency 2

A hotly debated topic, factor investing has increasingly been praised as capable of replicating outperformance typically associated with active management. Join Rolf Agather, research managing director at FTSE Russell, as he explores this topic and provides insights on how you may be able to use indexes and the ETFs based on them to replicate active strategies.

Participants

Presenter: Rolf Agather - Managing Director of North America Research, FTSE Russell

ETF Spotlight Talk: Relative Value Strategies to Express Your Conviction

2:50pm - 3:20pm
Track C - Location: Regency 3

The financial news is virtually daily consumed with a discussion of the relative value of one asset class compared to another; growth vs. value, emerging markets vs. developed market, etc. Today's savviest investors are developing strategies that express their views and conviction on these macro-themed market opportunities, and it's setting them apart from the pack. Join Direxion's Rob Nestor as he explores new and innovative ways to gain access to these institutional-style relative value strategies in accessible, cost-effective ways.

Participants

Presenter: Robert Nestor - President, Direxion

ETF Spotlight Talk: "ESG Gets Mainstream"

2:50pm - 3:20pm
Track D - Location: Atlantic 3

Participants

Presenter: Inderpal Gujral - Head of Product, Managing Director, STOXX

ETF Spotlight Talk: Fearing the Next Recession? Investing at the Front End of the Bond Market

2:50pm - 3:20pm
Track E - Location: Atlantic 2

Risk is rising late in the cycle. How should investors respond? We'll discuss how active short-duration ETFs can help investors de-risk, while tapping into potentially higher-yielding opportunities at the front end of the curve during this late-cycle phase.

Participants

Presenter: Jerome Schneider - Managing Director, Head of Short-Term Portfolio Management, PIMCO

No Pain, No Premium

2:50pm - 3:20pm
Peer To Peer Track - Location: Atlantic 1

In this closing peer-to-peer talk, we focus on reframing investors' portfolios, not as a collection of asset classes, but as a collection of risk. Join Corey as he discusses why he believes diversification is not a panacea, why excess returns require suffering through pain, why almost every investor's problem is one of failing fast versus failing slow, and how investments can be reclassified through the lens of risk to help investors better achieve their desired goals.

Participants

Presenter: Corey Hoffstein - CIO, Newfound Research

Networking Break

3:20pm - 3:50pm

Best New ETF 2018: A Battle of the ETF Pundits

3:50pm - 4:20pm
Main Session

Now in its fourth year, this Inside ETFs tradition pits the world's leading ETF pundits against each other with their best ETF choices. It's sure to provide you with a few laughs, raise more questions than answers, and ultimately leave you with a better understanding of the best ETFs that launched in 2018.

Participants

Referee: John Swolfs - CEO, Inside ETFs

Contestant: Eric Balchunas - ETF Analyst, Bloomberg Intelligence

Contestant: Matt Hougan - Chairman, Inside ETFs

Contestant: Ben Johnson - Director of Global ETF & Passive Strategies, Morningstar

Contestant: Elisabeth Kashner - Director of ETF Research, FactSet

Contestant: Tom Lydon - Editor & Publisher, ETF Trends

Contestant: Dave Nadig - Managing Director, ETF.com

Contestant: Todd Rosenbluth - Sr. Director, ETF & Mutual Fund Research, CFRA

ESG Investing: Planet, Purpose, Performance

4:20pm - 5:10pm
Main Session

The world around us is changing, technology is changing, how we invest is changing … so why aren't we? ETFs that capture ESG principles can help investors manage downside risks and enhance returns. Find out how ethically conscious investing can generate meaningful returns for your portfolio while making a positive impact on the world.

Participants

Panelist: Linda-Eling Lee - Managing Director & Global Head of ESG Research, MSCI

Moderator: Deborah Fuhr - Managing Partner, Founder, ETFGI

Panelist: Fiona Bassett - Global Co-Head Product & Global Co-Head Passive, DWS

Panelist: Vince Birley - CEO, Vident Financial

Panelist: Jordan Farris - Managing Director, Head of ETF Product Development, Nuveen

The Agg Is Broken, And So Is Your Core Fixed Income Allocation

5:10pm - 5:30pm
Main Session

With interest rates on the rise, bond investors need to take a closer look at what comprises the core of their fixed-income portfolios. Since the financial crisis, the agg has quietly morphed, most likely resulting in a different experience than investors expected. As the rate environment evolves, what will these changes mean for the index and investors holding a passive agg strategy?

Participants

Presenter: Benjamin Christensen - Executive Director, Global Fixed Income, Currency & Commodities Group, J.P. Morgan Asset Management

The Unmistakable Power of Leadership

5:30pm - 6:00pm
Main Session

In what has become one of the most highly anticipated sessions of the Inside ETFs conference, we scoured the globe to find the best and the brightest minds from outside the industry to help you be a better advisor.

Participants

Presenter: Joe Montana , aka "The Comeback Kid"

Tuesday Night Celebration

6:00pm - 7:30pm

Join fellow Inside ETFs delegates at our Tuesday night networking reception for one last evening in the lovely Florida weather. Make new connections and continue conversations.

SCHEDULE

DAY THREE - 12/02/2019

Inside ETFs

February 10 - 13, 2019
Diplomat Beach Resort
Hollywood, Florida

TIME	BREAKFAST WORKSHOP 1 - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 2 - LOCATION: REGENCY 1	MAIN SESSION	PEER TO PEER TRACK - LOCATION: ATLANTIC 1	TRACK A - LOCATION: REGENCY 1	TRACK B - LOCATION: REGENCY 2	TRACK C - LOCATION: REGENCY 3	TRACK D - LOCATION: ATLANTIC 3	TRACK E - LOCATION: ATLANTIC 2
6:00AM	**6:30am** - 2nd Annual Inside ETFs Fun-Run	**6:30am** - 2nd Annual Inside ETFs Fun-Run	**6:30am** - 2nd Annual Inside ETFs Fun-Run	**6:30am** - 2nd Annual Inside ETFs Fun-Run	**6:30am** - 2nd Annual Inside ETFs Fun-Run	**6:30am** - 2nd Annual Inside ETFs Fun-Run	**6:30am** - 2nd Annual Inside ETFs Fun-Run	**6:30am** - 2nd Annual Inside ETFs Fun-Run	**6:30am** - 2nd Annual Inside ETFs Fun-Run
7:00AM									
8:00AM	**8:00am** - Breakfast Workshop: J.P. Morgan Presents: An exclusive live recording of “In the Know” – What you need to know about ETFs in 2019	**8:00am** - Breakfast Workshop: FTSE Russell Presents: Everything Indexing: Roundtable Discussions							
9:00AM			**9:00am** - The Bubble Discussion: Prof. Robert Shiller & DoubleLine Capital’s Jeffrey Sherman **9:40am** - 10 Questions in 20 minutes: Risks & Rewards - A Global Approach						
10:00AM			**10:00am** - Figuring Out Factors: Strategies for Implementation **10:50am** - Networking Break						

SCHEDULE

DAY THREE - 12/02/2019

Inside ETFs

February 10 - 13, 2019
Diplomat Beach Resort
Hollywood, Florida

TIME	BREAKFAST WORKSHOP 1 - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 2 - LOCATION: REGENCY 1	MAIN SESSION	PEER TO PEER TRACK - LOCATION: ATLANTIC 1	TRACK A - LOCATION: REGENCY 1	TRACK B - LOCATION: REGENCY 2	TRACK C - LOCATION: REGENCY 3	TRACK D - LOCATION: ATLANTIC 3	TRACK E - LOCATION: ATLANTIC 2
11:00AM			**11:20am** - It's All About the Experience: Insights From Joe Duran **11:50am** - Fixed Income ETFs: Analyzing the Growing Demand						
12:00PM	**12:40pm** - Networking Lunch	**12:40pm** - Networking Lunch	**12:40pm** - Networking Lunch	**12:40pm** - Networking Lunch	**12:40pm** - Networking Lunch	**12:40pm** - Networking Lunch	**12:40pm** - Networking Lunch	**12:40pm** - Networking Lunch	**12:40pm** - Networking Lunch
1:00PM									
2:00PM				**2:00pm** - Hiring & Firing Investment Managers: What Institutional Investors Look For **2:50pm** - No Pain, No Premium	**2:00pm** - Active Fixed-Income ETFs: For Real? **2:50pm** - ETF Spotlight Talk: Not your Advisor's Style Investing	**2:00pm** - The ETF Strategist Round Table - 10 Big Questions **2:50pm** - ETF Spotlight Talk: Replicating Active Strategies Using ETFs	**2:00pm** - DIY vs. Outsourcing: The Curious Case of Multifactor Strategies **2:50pm** - ETF Spotlight Talk: Relative Value Strategies to Express Your Conviction	**2:00pm** - The New Frontier of Alpha: Robotics, AI & Disruptive Tech Investing **2:50pm** - ETF Spotlight Talk: "ESG Gets Mainstream"	**2:00pm** - The Hedge Fund Approach: The Smart Money in ETFs **2:50pm** - ETF Spotlight Talk: Fearing the Next Recession? Investing at the Front End of the Bond Market
3:00PM	**3:20pm** - Networking Break	**3:20pm** - Networking Break	**3:20pm** - Networking Break **3:50pm** - Best New ETF 2018: A Battle of the ETF Pundits	**3:20pm** - Networking Break	**3:20pm** - Networking Break	**3:20pm** - Networking Break	**3:20pm** - Networking Break	**3:20pm** - Networking Break	**3:20pm** - Networking Break

SCHEDULE

DAY THREE - 12/02/2019

Inside ETFs

February 10 - 13, 2019
Diplomat Beach Resort
Hollywood, Florida

TIME	BREAKFAST WORKSHOP 1 - LOCATION: ATLANTIC 1	BREAKFAST WORKSHOP 2 - LOCATION: REGENCY 1	MAIN SESSION	PEER TO PEER TRACK - LOCATION: ATLANTIC 1	TRACK A - LOCATION: REGENCY 1	TRACK B - LOCATION: REGENCY 2	TRACK C - LOCATION: REGENCY 3	TRACK D - LOCATION: ATLANTIC 3	TRACK E - LOCATION: ATLANTIC 2
4:00PM			**4:20pm** - ESG Investing: Planet, Purpose, Performance						
5:00PM			**5:10pm** - The Agg Is Broken, And So Is Your Core Fixed Income Allocation **5:30pm** - The Unmistakable Power of Leadership						
6:00PM	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration	**6:00pm** - Tuesday Night Celebration

SESSIONS

DAY FOUR - 13/02/2019

Around the World in 50 Minutes: A Tour of the Trends in the ETF Industry

8:00am - 8:50am
Breakfast Workshop 1 - Location: Atlantic 1

In this annual session, Inside ETFs alumnus Deborah Fuhr, Managing Partner & Founder at ETFGI, takes the stage to share the ins and outs of the evolving ETF landscape, highlighting the biggest trends and how they are being used, the newest innovations and where the ETF flows are going.

Participants

Presenter: Deborah Fuhr - Managing Partner, Founder, ETFGI

Big Ideas, New Solutions: Technology & the Future of Wealth Management

9:00am - 9:30am
Inside ETFs' 'Big Ideas' Day

Inside ETFs kicks off our 2nd annual "Big Ideas" day with a keynote designed to find new solutions in this ever-changing digital era. It's a sink-or-swim world out there for advisors: Let us help you destroy the status quo and empower you with new solutions that just might change your entire view on the asset management industry.

Participants

Presenter: Joshua Brown - CEO, Ritholtz Wealth Management

Big Ideas Talks: Fears & Fundamentals in Fixed-Income Markets

9:30am - 10:00am
Inside ETFs' 'Big Ideas' Day

With the U.S. Federal Reserve in the midst of a hiking cycle, and other central banks on its heels, many investors are worried about their fixed-income allocations. Western Asset Portfolio Manager Mark Lindbloom will dissect the current market fears, share where the firm finds value today, and discuss why active management should remain a priority in fixed-income portfolios.

Participants

Presenter: Mark Lindbloom - Portfolio Manager, Western Asset Management Company

Big Ideas Talk: Hartford Funds in Partnership With MIT AgeLab Presents 8,000 Days of Retirement

10:00am - 10:30am
Inside ETFs' 'Big Ideas' Day

"What will you do on day one of retirement?" Most clients have a clear image of day one. But few can imagine 8,000 days of golf, and even fewer know what they'll be doing on any given day. Consider reframing the conversation to reflect a four-phased retirement concept. Each is characterized by the issues individuals are most likely to be managing. The four retirement phases enable a clear vision to plan and anticipate what's likely to come.

Participants

Presenter: John Diehl - SVP, Strategic Markets, Hartford Funds

Big Ideas Talk: Lighting Up: The Cannabis Revolution

10:30am - 10:50am
Inside ETFs' 'Big Ideas' Day

Cannabis ETFs have taken in the assets, putting up impressive returns, and it seems everyone's hopping on the bandwagon. Coca-Cola even announced it was looking at cannabis-infused pop. But just about any industry expert you ask will say the cannabis revolution is only just beginning. Join Tim Seymour as he explains why the revolution is in its infancy, what the future holds and how to invest in this growing industry.

Participants

Presenter: Tim Seymour - CIO, Seymour Asset Management

Networking Break

10:50am - 11:10am
Inside ETFs' 'Big Ideas' Day

Institutional Asset Owners & ETFs: Still in the Future?

11:10am - 11:50am
Inside ETFs' 'Big Ideas' Day

Originally designed for institutions, ETFs have yet to be embraced as tools for tactical investing in addition to long-term investment vehicles. Public pensions, private banks and multifamily offices face unique considerations when it comes to using ETFs across various asset classes. A panel of senior investment experts, moderated by the CFA Institute, will discuss their views on ETFs, indexing and systemic risk.

Participants

Panelist: Case Fell - CIO, NYSNA Pension Plan & Benefits Fund

Moderator: Paul Kovarsky - Director, Institutional Relationships, CFA Institute

Panelist: David Carter - CIO, Lenox Wealth Advisors

Panelist: Joseph Janocko - Sr. Portfolio Strategist, Florida Blue

Closing Keynote: The Science of Investing – Creating Efficient Portfolios to Avoid Black Swans

11:50am - 12:30pm
Inside ETFs' 'Big Ideas' Day

Investing has slowly evolved from an art form based on hunches and rumors into an ever-more sophisticated understanding of how companies, securities and markets work. In short, investing has stopped being an art form; it's become science. Hear famed investor Larry Swedroe on why this is the right approach, and how it can help reduce the risk of a black swan in your clients' portfolios.

Participants

Presenter: Larry Swedroe - Director of Research, Buckingham Strategic Wealth

Conference Concludes

12:30pm - 12:35pm
Inside ETFs' 'Big Ideas' Day

SCHEDULE

DAY FOUR - 13/02/2019

Inside ETFs

February 10 - 13, 2019
Diplomat Beach Resort
Hollywood, Florida

TIME	BREAKFAST WORKSHOP 1 - LOCATION: ATLANTIC 1	INSIDE ETFS' 'BIG IDEAS' DAY
8:00AM	**8:00am** - Around the World in 50 Minutes: A Tour of the Trends in the ETF Industry	
9:00AM		**9:00am** - Big Ideas, New Solutions: Technology & the Future of Wealth Management **9:30am** - Big Ideas Talks: Fears & Fundamentals in Fixed-Income Markets
10:00AM		**10:00am** - Big Ideas Talk: Hartford Funds in Partnership With MIT AgeLab Presents 8,000 Days of Retirement **10:30am** - Big Ideas Talk: Lighting Up: The Cannabis Revolution **10:50am** - Networking Break
11:00AM		**11:10am** - Institutional Asset Owners & ETFs: Still in the Future? **11:50am** - Closing Keynote: The Science of Investing – Creating Efficient Portfolios to Avoid Black Swans
12:00PM		**12:30pm** - Conference Concludes