

FINANCIAL MARKETS AND THE ECONOMY

Financial Literacy Day III

Join us on April 11, 2019!

8:30 A.M. - 4:00 P.M. | Registration: 8:00 A.M.

Cost: \$50

Coffee, pastries and lunch included

**Selby Auditorium at USF Sarasota-Manatee:
8350 N. Tamiami Trail Sarasota, FL 34243**

Panel Discussions Include:

- Outlook for the US Stock Market & Global Economic Outlook
- Special Session: Health, Hunger and Philanthropy
- How the World Looks in Economics and Geopolitics
- Keynote Speaker: Gretchen Morgenson, *The Wall Street Journal*: Senior Special Writer, Investigations Unit



Featured Speakers

Gretchen Morgenson

The Wall Street Journal
Senior Special Writer,
Investigations Unit

Susan Harper

Canadian Consul General
in Miami
Former Economic Minister for
Embassy of Canada

Learn more and register: usfsm.edu/financialliteracy



FINANCIAL MARKETS AND THE ECONOMY

Financial Literacy Day III Agenda

Thursday, April 11, 2019

8:00 – 8:30 a.m. | Registration and Coffee

8:30 – 9:00 a.m. | Welcoming Remarks

David R. Kotok, CIO, Cumberland Advisors, GIC Board Member
Karen Holbrook, Regional Chancellor, USF Sarasota-Manatee

9:00 – 10:00 a.m. | Session I – The Stock Market

Matt McAleer, Executive VP & Director of Equity Strategies, Cumberland Advisors
Richard Hoey, Senior Economic Advisor to BNY Mellon Wealth Management
Tripp Zimmerman, Director of Research at WisdomTree Asset Management, Inc.
Moderator: Maryanne Waldman, First Vice President – Financial Advisor, RBC Wealth Management, GIC Board Member

10:00 – 10:15 a.m. | Break

10:15 – 11:30 a.m. | Session II – Health Hunger and Philanthropy

Judith Monroe, President and CEO, CDC Foundation
Erin McLeod, CEO, Friendship Centers, Sarasota, FL
Lisa Marsh Ryerson, President, AARP Foundation
Gabriel Hament, Portfolio Manager, Charitable and Foundation Accounts, Cumberland Advisors
Moderator: Lisa Shaw, CFP, CIMA, Managing Partner, Cygnus Asset Management, LLC

11:30 a.m. – 12:00 p.m. | Special Report on the Use of the Bloomberg Terminals – Two Years Later

Paul Bova, Director of Development and/or Dr. GJ de Vreede, Dean, University of South Florida Sarasota-Manatee College of Business

Noon – 1:00 p.m. | Lunch

1:00 – 1:15 p.m. | Report on National and International Financial Literacy on-line exams

Christine Brown, CFA Tampa Bay, Society Executive, Tampa, FL

1:15 – 2:00 p.m. | A Conversation with Canada's Consul General in Florida

Susan Harper, Canadian Consul General in Miami, Former Economic Minister for Embassy of Canada

2:00 – 3:00 p.m. | Session III – How the World Looks to Me

Leland Miller, CEO, China Beige Book International
Paul O'Brien, Former Deputy Chief Investment Officer, Strategy and Planning Department, Abu Dhabi Investment Authority, ADIA.
Moderator: Alison Gardner, Senior Vice President & Financial Advisor, RBC Wealth Management

3:00 – 3:15 p.m. | Break

3:15 – 4:00 p.m. | Keynote Speaker

Gretchen Morgenson, Senior Special Writer in the Investigations unit at The Wall Street Journal

4:00 p.m. | Concluding Remarks

Reception and Book Signing

