



Save the Date
Fourth Annual Strategas Investment Forum at Tucker's Point
Date: October 5th-October 8th, 2017



Dr. Bjorn Lomborg
President Copenhagen
Consensus Center



Nicholas Bohnsack
Partner & Head of
Quantitative Research,
Strategas Partners



Dan Clifton
Partner & Head of Policy
Research, Strategas
Partners



**Jason DeSena
Trennert**
Managing Partner & Chief
Investment Strategist,
Strategas Partners



Don Rissmiller
Partner & Chief Economist,
Strategas Partners



Chris Verrone
Partner & Head of Technical
Analysis, Strategas Partners



Thursday, October 5, 2017

11:00 AM to 03:00 PM

Rosewood Tucker's Point

Guest Arrival

06:30 PM to 09:30 PM

Tucker's Point - Pergola Terrace

Welcome Reception

Cocktails and island fare will be served. Entertainment by the Onion Patch Crew.

Friday, October 6, 2017

07:30 AM to 07:30 AM

Tucker's Point - Soncy/Chelston
Rooms

Breakfast

08:00 AM to 10:30 AM

10:45 AM to 11:45 AM

Investment Roundtable Session I

The Trump-flation Trade: Really a Trump Trade plus a Reflation Trade

• **Dan Clifton**

Partner & Head of Policy Research,
Strategas Partners

• **Don Rissmiller**

Partner & Chief Economist,
Strategas Partners

12:00 PM to 12:00 PM

Rosewood Tucker's Point

Group Recreations

Golf, Tennis, Sailing & Snorkeling available.

06:45 PM to 08:45 PM

Tucker's Point Beach Club

Cocktails & Dinner: Global Priorities Bigger Than Climate Change

• **Dr. Bjorn Lomborg**

President
Copenhagen Consensus Center

Saturday, October 7, 2017

07:30 AM to 07:30 AM

Tucker's Point - Soncy/Chelston
Rooms

Breakfast

08:00 AM to 09:00 AM

Strategas Analyst Roundtable



- **Jason DeSena Trennert**
Managing Partner & Chief Investment Strategist,
Strategas Partners

- **Nicholas Bohnsack**
Partner & Head of Quantitative Research,
Strategas Partners

- **Chris Verrone**
Partner & Head of Technical Analysis,
Strategas Partners

09:15 AM to 11:45 AM

Investment Roundtable Session II

12:15 PM to 01:15 PM

Roundtable Lunch; What Does the Investment Business Look Like in 10 Years?

02:00 PM to 02:00 PM

Afternoon Recreations

Rosewood Tucker's Point

06:30 PM to 08:30 PM

Social Cocktails and Dinner

Tucker's Point - Sul Verde

Sunday, October 8, 2017

08:00 AM to 03:00 PM

Departure

Rosewood Tucker's Point

SPEAKERS



Dr. Bjorn Lomborg

President
Copenhagen Consensus Center



Nicholas Bohnsack

Partner & Head of Quantitative Research,
Strategas Partners

Mr. Bohnsack is co-founder and partner of Strategas. He is the President and Chief Operating Officer of the Firm and heads the Firm's Institutional Securities and Financial Solutions business groups.

As an analyst, Mr. Bohnsack is head of Strategas' Quantitative Research team and directs the Firm's equity sector strategy and global asset allocation research efforts. More granularly he and his team focus on industry-level earnings and valuation forecasting and fundamental factor analysis to assist institutional investors in portfolio construction and thematic idea generation. He has been a regular guest on business news programs and has been widely quoted in the domestic and foreign press, particularly for his work on corporate profits and market valuation.

Prior to co-founding Strategas, Nicholas was an Investment Strategist and Associate Managing Director with International Strategy & Investment (ISI) Group. Nicholas began his career in the Investment Banking Group at FactSet and in Restricted Securities at Morgan Stanley.

Mr. Bohnsack received his MS in Mathematics from Fairfield University and received bachelor's degrees in Economics and Finance from Bryant University. He is a member of the Board of Advisors at Bryant University's College of Business. Nicholas and his wife, Brooke, live in Connecticut with their three sons.



Dan Clifton

Partner & Head of Policy Research,
Strategas Partners

Mr. Clifton is a Partner at Strategas and the head of the Firm's DC office. He directs its legislative and public policy research efforts. Prior to joining Strategas he served as Executive Director of the American Shareholders Association (ASA), a non-partisan, non-profit organization which analyzes public policy affecting shareholders.

His research and political analysis on the interaction between legislation, policy and capital markets has been widely cited in the media. Mr. Clifton and his team have been recognized by *Institutional Investor* magazine in their annual survey for the past five years.

Prior to joining the ASA, Mr. Clifton served as Chief Economist and Federal Affairs Manager for Americans for Tax Reform and as a senior staff member in two gubernatorial administrations working on economic issues. Mr. Clifton received a MS in Economics and Public Finance from Rutgers University and a BA in Urban Planning and Policy Development also from Rutgers.



Jason DeSena Trennert

Managing Partner & Chief Investment Strategist,
Strategas Partners

Mr. Trennert is the Managing Partner of Strategas Research Partners LLC and the Chairman and Chief Executive Officer of the firm's broker-dealer subsidiary, Strategas Securities, LLC. In addition, as Chief Investment Strategist, Mr. Trennert is known as one of Wall Street's top thought leaders on the subject of markets and economic policy. His research pieces are read by leading institutional investors and corporate executives across the globe.

In 2006, Mr. Trennert co-founded Strategas, which originally began with just five employees. Today, the firm employs over fifty research analysts, institutional salesmen, and sales traders at its offices in New York, Washington D.C., and Columbus, Ohio. Prior to founding Strategas, Mr. Trennert was the Chief Investment Strategist and a Senior Managing Director at International Strategy & Investment (ISI) Group where he built and oversaw two of that Firm's most popular research efforts, its Company Surveys and Investment Strategy groups.

Widely quoted in the domestic and foreign press, Jason is a regular guest host on CNBC's "Squawk Box" and "Bloomberg Surveillance" with Tom Keene. His second book, *My Side of the Street*, was published by St. Martin's Press in May.

He was the Treasurer of La Scuola d'Italia where he built its investment committee. He is a member of the Board of Governors of The Columbus Citizens Foundation and a member of the investment committee of the Rockefeller Brothers Fund.

He has an MBA from The Wharton School at the University of Pennsylvania and BS in International Economics from Georgetown University.



Don Rissmiller

Partner & Chief Economist,
Strategas Partners

Mr. Rissmiller is a founding Partner of Strategas and has directed the Firm's macroeconomic research efforts since 2006. He oversees Strategas' thematic research as well as high-frequency econometric forecasting.

Prior to co-founding Strategas in 2006, Mr. Rissmiller was an Economist and Managing Director at International Strategy & Investment (ISI) Group. Before joining ISI, he worked at the Federal Reserve Bank of New York, focusing on the analysis of U.S. macroeconomic data and price/wage forecasting models. He is frequently quoted in the financial press. He has been the president of the Forecasters Club of New York, a local group of economists. He serves on the board of the Global Interdependence Center (GIC) based in Philadelphia.

Mr. Rissmiller's research has been recognized by *Institutional Investor* magazine in their annual survey: he was ranked best up and coming economist in 2008, and was 3rd in their 2009 All-America Independent Research Team survey. Mr. Rissmiller holds an AB magna cum laude in Economics from Harvard.



Chris Verrone

Partner & Head of Technical Analysis,
Strategas Partners

Mr. Verrone is a partner of Strategas. He is the head of the Firm's Technical Analysis Research team. His regularly published research highlights actionable investment opportunities across the equity, commodity, foreign exchange, and fixed income markets. In addition, Mr. Verrone actively works with the Firm's institutional clients to provide bespoke analysis on individual securities.

Chris is a frequent guest on CNBC, FOX Business, and Bloomberg Television, and is often quoted in the domestic and foreign financial press. He is consistently ranked among the top Technical Analysts on Wall Street in the annual All-America Research Survey by *Institutional Investor* magazine.

Mr. Verrone has earned the Chartered Market Technician (CMT) designation and is a member of the Market Technicians Association. Prior to joining Strategas, Mr. Verrone worked with the Economics team at International Strategy & Investment (ISI) Group and at the Foreign Policy Research Institute. Chris holds a MA in Comparative Politics from Villanova University and a BA in International Political Economy, also from Villanova. He is also active with the Delbarton School Alumni Association. Chris and his wife, Caroline, reside in New York City.

Accommodations

Rosewood Tucker's Point
60 Tucker's Point Drive, Hamilton
Parish, HS02, Bermuda

Room availability & Rates(per night)*

Superior & Manor House Deluxe King Rooms \$650

*Resort fees, Government fees and gratuities not included in price listed.

Reservation may be secured under the Strategas room block by calling
888.Rosewood or emailing

tuckerpoint.reservations@rosewoodhotels.com.