



Our 14th Annual Investment Conference will highlight important investment trends, large and small, driving the economy and the markets. If you are interested in attending, please be sure to reach out to your Strategas salesperson at 212-906-0130.



Lawrence H. Summers
Former President of Harvard
and Treasury Secretary



Dan Clifton
Head of Policy Research
Strategas



Howard Marks
Co-Chairman
Oaktree Capital



Yana Barton, CFA
Vice President and Co-
Director of Growth Equity
Eaton Vance Management



Alex Berenson
Winner of the Edgar Award
and #1 New York Times Best
Seller



Mark Giambrone
Senior Managing Director,
Equity Portfolio
Manager/Analyst
Barrow Hanley Global
Investors



Jim Murren
Former Chairman and CEO
MGM Resorts International



Binney H. C. Wietlisbach
President
Haverford Trust Company



Austin Russell
Founder & CEO
Luminar Technologies

Thursday, March 11, 2021

08:45 AM to 09:30 AM

COVID-19

Webcast

• **Alex Berenson**

Winner of the Edgar Award and #1 New York Times Best Seller

09:30 AM to 10:15 AM

Coffee with Clifton - Washington and the Investment Landscape• **Dan Clifton**Head of Policy Research
Strategas

10:15 AM to 10:30 AM

Break

10:30 AM to 11:15 AM

Gaming Industry/SPACS• **Jim Murren**Former Chairman and CEO
MGM Resorts International

11:15 AM to 12:00 PM

It's just good business- what my mother taught me about growing and building a \$11B business• **Binney H. C. Wietlisbach**President
Haverford Trust Company

12:00 PM to 12:15 PM

Break

12:15 PM to 01:00 PM

A Hinge Moment in History• **Lawrence H. Summers**

Former President of Harvard and Treasury Secretary

01:00 PM to 01:45 PM

Long-Term Investing in a Short-Term Focused World• **Yana Barton, CFA**Vice President and Co-Director of Growth Equity
Eaton Vance Management

01:45 PM to 02:00 PM

Break

02:00 PM to 02:45 PM

Autonomous Driving



- **Austin Russell**
Founder & CEO
Luminar Technologies
-

02:45 PM to 03:30 PM

Value Investing

- **Mark Giambrone**
Senior Managing Director, Equity Portfolio Manager/Analyst
Barrow Hanley Global Investors
-

03:30 PM to 04:15 PM

On the Bond Market

- **Howard Marks**
Co-Chairman
Oaktree Capital

SPEAKERS



Lawrence H. Summers

Former President of Harvard and Treasury Secretary

Former Treasury Secretary Lawrence H. Summers is one of America's leading economists. In addition to serving as 71st Secretary of the Treasury in the Clinton Administration, Dr. Summers served as Director of the White House National Economic Council in the Obama Administration, as President of Harvard University, and as the Chief Economist of the World Bank.

Dr. Summers' tenure at the U.S. Treasury coincided with the longest period of sustained economic growth in U.S. history. He is the only Treasury Secretary in the last half century to have left office with the national budget in surplus.

Dr. Summers has played a key role in addressing every major financial crisis for the last two decades. During the 1990s, he was a leader in crafting the U.S. response to international financial crises arising in Mexico, Brazil, Russia, Japan, and Asian emerging markets. As one of President Obama's chief economic advisors, Dr. Summers' thinking helped shape the U.S. response to the 2008 financial crisis, to the failure of the automobile industry, and to the pressures on the European monetary system. Upon Summers' departure from the White House, President Obama said, "I will always be grateful that at a time of great peril for our country, a man of Larry's brilliance, experience and judgment was willing to answer the call and lead our economic team."

The Economist recognized his influence when it defined the "Summers Doctrine," an approach to economic policy during financial crises that fuses a microeconomic "laissez faire" mentality with macroeconomic activism. "Markets should allocate capital, labour and ideas without interference, but sometimes markets go haywire, and must be counteracted forcefully by government."

Summers' five years as President of Harvard represented a time of major innovation for the University. He focused on equality of opportunity and removing all financial obligation from students with family incomes below \$60,000 a year. He launched a major effort to make Boston, and Cambridge in particular, the global leader in life sciences research, with the formation of major programs for stem cell research and genomics. Perhaps most importantly, he led efforts to renew Harvard College with dramatic increases in study abroad programs, faculty-student contact, and collaboration across the University during his tenure.

Currently, Dr. Summers is the President Emeritus and the Charles W. Eliot University Professor at Harvard University, where he became a full professor at age 28, one of the youngest in Harvard's recent history. He directs the University's Mossavar-Rhomani Center for Business and Government. Summers was the first social scientist to receive the National Science Foundation's Alan Waterman Award for scientific achievement and, in 1993, he was awarded the John Bates Clark Medal, given to the most outstanding economist under 40 in the United States. He was elected to the National Academy of Sciences in 2002. He has published several books and more than 150 papers in scholarly journals.

Summers is an advisor to businesses and investors. He serves on the board of two cutting edge financial services startups—Square and Lending Club. He also chairs the boards of Citizen Schools and the Center for Global Development and serves on the executive committee of the board for Teach for America. He recently chaired the Commission on Global Health, lauded by the UN Secretary General who noted that it "will bring more than health – it will bring equity, and contribute to a life of dignity for all."

President Bill Clinton said that Larry Summers "has the rare ability to see the world that is taking shape and the skill to help to bring it into being." He has been recognized as one of the world's most influential thinkers by Time, Foreign Policy, Prospect and The Economist magazines among many others. In his speeches, regular newspaper columns in The Financial Times and public commentary, he continues to move forward the debate on national and global economic policy.



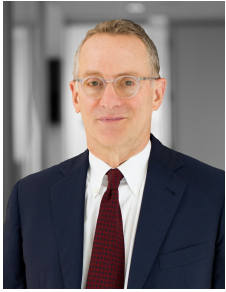
Dan Clifton

Head of Policy Research
Strategas

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.



Howard Marks

Co-Chairman
Oaktree Capital

Since the formation of Oaktree in 1995, Mr. Marks has been responsible for ensuring the firm's adherence to its core investment philosophy; communicating closely with clients concerning products and strategies; and contributing his experience to big-picture decisions relating to investments and corporate direction. From 1985 until 1995, Mr. Marks led the groups at The TCW Group, Inc. that were responsible for investments in distressed debt, high yield bonds, and convertible securities. He was also Chief Investment Officer for Domestic Fixed Income at TCW. Previously, Mr. Marks was with Citicorp Investment Management for 16 years, where from 1978 to 1985 he was Vice President and senior portfolio manager in charge of convertible and high yield securities. Between 1969 and 1978, he was an equity research analyst and, subsequently, Citicorp's Director of Research. Mr. Marks holds a B.S.Ec. degree *cum laude* from the Wharton School of the University of Pennsylvania with a major in finance and an M.B.A. in accounting and marketing from the Booth School of Business of the University of Chicago, where he received the George Hay Brown Prize. He is a CFA® charterholder. Mr. Marks is a Trustee and Chairman of the Investment Committee at the Metropolitan Museum of Art. He is a member of the Investment Committee of the Royal Drawing School and is Professor of Practice at King's Business School (both in London). He serves on the Shanghai International Financial Advisory Council and the Advisory Board of Duke Kunshan University. He is an Emeritus Trustee of the University of Pennsylvania, where from 2000 to 2010 he chaired the Investment Board.

**Yana Barton, CFA**

Vice President and Co-Director of Growth Equity
Eaton Vance Management

Yana Barton is a vice president of Eaton Vance Management and co-director of growth equity, where she is a portfolio manager on a number of Eaton Vance's domestic equity and tax-managed equity portfolios. She is responsible for buy and sell decisions, portfolio construction and risk management for these strategies. Yana is a member of Eaton Vance's Equity Strategy Committee and Diversity & Inclusion Leadership Council. She is also a founding member and the first chair of Eaton Vance's Women's Leadership Exchange. Yana began her career in the investment management industry with Eaton Vance in 1997.

Yana earned a Bachelor of Science in business administration from the University of Florida. She is a member of the CFA Society Boston and is a CFA charterholder.



Alex Berenson

Winner of the Edgar Award and #1 New York Times Best Seller

Alex Berenson was born in New York in 1973 and grew up in Englewood, N.J. After graduating from Yale University in 1994 with degrees in history and economics, he joined the Denver Post as a reporter. In 1996, he became one of the first employees at TheStreet.com, the groundbreaking financial news Website.

In 1999, he joined *The New York Times*. At the *Times*, he covered everything from the drug industry to Hurricane Katrina; in 2003 and 2004, he served two stints as a correspondent in Iraq, an experience that led him to write *The Faithful Spy*, his debut novel, which won the Edgar Award from the Mystery Writers of America for Best First Novel. He left the *Times* in 2010 to devote himself to writing fiction. But conversations with his wife led him to begin researching the science around cannabis and mental illness, a project that became the book *Tell Your Children*, published in January 2019.

He has now written twelve John Wells novels and two non-fiction books, *The Number* and *Tell Your Children*. Alex lives in the Hudson Valley with his wife, Dr. Jacqueline Berenson, a forensic psychiatrist, and their children.



Mark Giambrone

Senior Managing Director, Equity Portfolio Manager/Analyst
Barrow Hanley Global Investors

Mr. Giambrone joined Barrow Hanley in 1999. Prior to joining Barrow Hanley, Mr. Giambrone served as a portfolio consultant at HOLT Value Associates. During his career, he has also served as a senior auditor/tax specialist for KPMG Peat Marwick and Ernst & Young Kenneth Leventhal. Mr. Giambrone graduated summa cum laude from Indiana University with a BS in Business and received an MBA from the University of Chicago.



Jim Murren

Former Chairman and CEO
MGM Resorts International

James Murren was appointed to lead the Nevada COVID-19 Response, Relief and Recovery Task Force by Governor Steve Sisolak. He served on the National Infrastructure Advisory Council and has been a member of the Board of Trustees for Howard University since 2016. Mr. Murren first joined MGM Resorts International in 1998 as the Chief Financial Officer and served as the former Chairman and CEO of MGM Resorts International until retiring in 2020. He also served as Chairman of the American Gaming Association and was on the Board of Trustees of the Brookings Institution. Mr. Murren co-founded the Nevada Cancer Institute, which was the official cancer institute for the state of Nevada until 2013. He is also a founding contributor to Nevada's first Fisher House which provides housing for military and Veterans' families. He has served as a member of the Business Roundtable, an association of CEOs of leading U.S. companies. Mr. Murren received his Bachelor of Arts from Trinity College.



Binney H. C. Wietlisbach

President
Haverford Trust Company

Ms. Binney Wietlisbach is the firm's President and has been with Haverford since 1992. Binney has worked in the financial services industry since 1985. She is a member of the Executive Committee, a voting member of the Investment Selection Committee, and a member of the Board of Directors of The Haverford Trust Company.

Achievements & Recognitions

- Society of the Holy Child Jesus "Faith in Action Award" 2019
- Main Line Chamber of Commerce "Helena Devereux Women in Leadership Award" 2017
- Keynote speaker: Women's Resource Center Leadership Luncheon 2017
- Penn State "Outstanding Liberal Arts Alumni in Business Award" 2016
- Barron's "Top 1,200 Financial Advisors" 2011– 2015
- Barron's "Top 100 Women Financial Advisors" 2010 – 2015
- Moxie Women cover story "Empowering Women by Taking The Mystery Out of Money Management" June 2013
- Mainline Today "Woman on the Move" 2010
- Philadelphia Business Journal "Women of Distinction" 2008

Certifications & Education

- B.S. from Pennsylvania State University
- FINRA Series 7, 24, 27, 63, and 65

Board Affiliations & Professional Memberships

- Board of Directors, Caroline A. Buck Foundation
- Board of Directors, Mindfulness Through Movement
- Board of Directors, Connelly Foundation
- Independent Director, Philadelphia Section PGA

Previous Experience

- Private Banking Department, Meridian Bank

Previous Board Affiliations

- Board of Directors, Children's Hospital of Philadelphia
- Alumni Board, Pennsylvania State University, College of the Liberal Arts
- Board of Directors, Philadelphia Bar Foundation
- Board of Counselors, Historical Society of Pennsylvania
- Member, Georgetown University Parent's Leadership Council
- Finance Committee, The Baldwin School
- National Advisory Board, Baldwin School
- Regional Board, F.O.C.U.S.

Client Service Support Team

- Betty Tafel, Senior Investment Officer
- Leslie Wentz, Investment Officer



Austin Russell

Founder & CEO
Luminar Technologies

Austin Russell is an engineer, entrepreneur, and lidar industry pioneer for Autonomous Vehicles. He founded Luminar at the age of 17 while pursuing research in optical technologies and exploring applications across the medical, augmented reality, robotics and automotive industries. After a brief stint in the Stanford applied physics department, Austin accepted the Thiel Fellowship to pursue his vision of developing a new kind of sensor technology with a mission to make autonomous vehicles both safe and ubiquitous. In 2017, Austin was recognized as one of MIT Technology Review's Innovators Under 35 and Forbes' 30 under 30.