

Libby Cantrill

Managing Director, Head of
Public Policy
PIMCO



Dan Clifton

Head of Policy Research
Strategas



Martin Durbin

Senior Vice President, Policy
U.S. Chamber of Commerce



Chris Jennings

Health Policy Expert and
Presidential Advisor



Bruce Mehlman

Founder
Mehlman Castagnetti Rosen
& Thomas



General David Petraeus

Former Director of the CIA
Partner, KKR



Jeff Roe

Founder & CEO
Axiom Strategies



Daniel Tarullo

Former Federal Reserve
Governor & Nomura
Professor of International
Financial Regulatory Practice
Harvard Law School



Wednesday, January 19, 2022

08:30 AM to 09:15 AM

Keynote Presentation

- **Bruce Mehlman**
Founder
Mehlman Castagnetti Rosen & Thomas

09:15 AM to 10:00 AM

Policy Outlook

- **Libby Cantrill**
Managing Director, Head of Public Policy
PIMCO

10:00 AM to 10:15 AM

Break

10:15 AM to 11:00 AM

Midterm Elections

- **Jeff Roe**
Founder & CEO
Axiom Strategies

11:00 AM to 11:45 AM

Financial Regulation

- **Daniel Tarullo**
Former Federal Reserve Governor & Nomura Professor of International
Financial Regulatory Practice
Harvard Law School

11:45 AM to 12:00 PM

Break

12:00 PM to 01:00 PM

Geopolitics

- **General David Petraeus**
Former Director of the CIA
Partner, KKR

01:00 PM to 01:15 PM

Break

01:15 PM to 02:00 PM

Energy

- **Martin Durbin**
Senior Vice President, Policy
U.S. Chamber of Commerce

02:00 PM to 02:45 PM

Tax Policy



- **Dan Clifton**
Head of Policy Research
Strategas
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02:45 PM to 03:00 PM

Break

03:00 PM to 03:45 PM

Health Care

- **Chris Jennings**
Health Policy Expert and Presidential Advisor

SPEAKERS



Libby Cantrill

Managing Director, Head of Public Policy
PIMCO

Ms. Cantrill is a managing director and the head of public policy for PIMCO. In her role, she helps to coordinate the firm's response to public policy issues and analyzes policy and political risk for the firm's Investment Committee. She is also a member of the firm's Americas Portfolio Committee and is a founding member of PIMCO Families and PIMCO Women. Prior to joining PIMCO in 2007, she served as a legislative aide in the House of Representatives and also worked in the investment banking division at Morgan Stanley. She has 17 years of investment experience and holds an MBA from Harvard Business School and received her undergraduate degree in economics from Brown University. Ms. Cantrill is a CFA charterholder and a regular contributor to Bloomberg and CNBC. She is also a member of the Council on Foreign Relations.



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.



Martin Durbin

Senior Vice President, Policy
U.S. Chamber of Commerce

Martin (Marty) Durbin is president of the U.S. Chamber of Commerce's Global Energy Institute (GEI). Durbin leads GEI's efforts to build support for meaningful energy action through policy development, education, and advocacy, making it a go-to voice for commonsense energy solutions.

Previously, Durbin was the executive vice president and chief strategy officer at the American Petroleum Institute (API), where he integrated API's broad advocacy capabilities in pursuit of the organization's and the industry's public policy priorities. He returned to API after serving for nearly three years as president and CEO of America's Natural Gas Alliance (ANGA), representing North America's leading independent natural gas exploration and production companies. There he oversaw ANGA's market expansion efforts with industry, government, and consumer stakeholders. At the end of 2015, he guided ANGA's ultimate combination into API to better achieve the mission of both organizations.

Before joining ANGA, Durbin served as executive vice president of Government Affairs at API. Subsequently, Durbin served as vice president of Federal Relations at the American Chemistry Council (ACC). Prior to the merger of the ACC and the American Plastics Council (APC) in 2002, Durbin directed Federal and International Affairs for APC, serving as a liaison to sister organizations in Canada, Europe, Japan, Mexico, and South America. Earlier in his career he served as a legislative assistant for Sen. Alan J. Dixon (D-IL) and for Rep. Rick Boucher (D-VA).

Durbin serves as chairman of the Board for A Wider Circle, a grassroots nonprofit organization dedicated to ending poverty for one individual and one family after another. In 2021, he made *Washingtonian's* inaugural Most Influential List, which highlights people who work tirelessly as advocates to change and improve the federal policies that have large impacts on people, states, businesses, foreign affairs, safety and security.



Chris Jennings

Health Policy Expert and Presidential Advisor

Chris Jennings is an over three decades-long health policy veteran of the White House, the Congress and the private sector. He is the President and Founder of Jennings Policy Strategies, a nationally respected health care consulting firm committed to assisting foundations, purchasers, health systems and aligned stakeholders develop policies to ensure quality, affordable health care. He is also a senior fellow at the Bipartisan Policy Center.

In 2020, he served on the Biden-Sanders Task Force, as co-chair of the Biden Health Committee and an advisor to the Biden Transition. Mr. Jennings served President Obama as the Senior Advisor for Health Policy and Coordinator of Health Reform through January 2014. He served in a similar capacity in the Clinton White House for nearly eight years.

Since 1992, Mr. Jennings has advised many Democratic Presidential campaigns on health policy and was appointed to the 2008, 2016 and 2020 Democratic Platform Drafting Committees. In the decade prior, he served in the U.S. Senate for three Senators (Pryor, Glenn and Melcher) on the Senate Finance and Special Committee on Aging. He has counseled countless Democratic gubernatorial and Congressional candidates and has been a trusted advisor of the Congressional Leadership and their staffs for decades.



Bruce Mehlman

Founder
Mehlman Castagnetti Rosen & Thomas

With over two decades experience in public policy, business and the law, Bruce helps leaders and organizations understand, anticipate and navigate political risk.

Mehlman is a highly sought-after keynote speaker on policy and political trends, regularly headlining business conferences and strategic planning sessions. His quarterly infographic analyses are consistently picked-up by national media and eagerly consumed by tens of thousands of readers around the world. Television networks such as CNBC, Fox News, Fox Business and Hearst often ask Bruce to appear to discuss trends and their implications.

Bruce previously served as Assistant Secretary of Commerce for Technology Policy under President George W. Bush. He also worked as a senior leadership aide in the House of Representatives, general counsel to a national political party committee and policy counsel to Cisco Systems.

Bruce is widely-regarded as an expert in running coalitions, quarterbacking issue campaigns and managing C-suite associations, bringing innovative approaches and determined execution to achieve impactful outcomes. An Adjunct Professor and Board Member of The Washington Campus, Bruce frequently lectures MBA candidates on “effective business-government relations.” Bruce serves on the advisory boards of start-up companies including FiscalNote, iLearningEngines and Virtru, in addition to serving on the Boards of the Center for Democracy & Technology, The Washington Campus and the State Science & Technology Institute.

Bruce received a BA degree from Princeton University and a JD from the University of Virginia Law School where he served on the Virginia Law Review.



General David Petraeus

Former Director of the CIA
Partner, KKR

General David H. Petraeus is one of the most prominent U.S. military figures of the post-9/11 era. He has been described as a leading warrior-intellectual and “one of the great battle captains” in American military history. Following his military service, he served as Director of the CIA. He is now a Partner with the global investment firm KKR and Chairman of the KKR Global Institute.

During his 37-year career in the United States Army, General Petraeus served in Cold War Europe, Central America, the United States, Haiti, Bosnia, Kuwait, Iraq, Afghanistan, and the greater Middle East and central Asia. He was most widely recognized for: his oversight of the organization that produced the U.S. Army’s counterinsurgency manual and overhauled all aspects of preparing leaders and units for deployment to combat; for his leadership of the Surge in Iraq; and for his command of coalition forces in Afghanistan. He culminated his military career with six consecutive commands as a general officer, five of which were in combat, a record believed unmatched in the post-World War II era.

A graduate with distinction from the United States Military Academy, General Petraeus is the only person in U.S. Army history to be the top graduate in both the U.S. Army’s challenging Ranger School and the year-long U.S. Army Command and General Staff College course. He also earned a Ph.D. in an interdisciplinary program of international relations and economics from Princeton University’s Woodrow Wilson School of Public and International Affairs and later completed a fellowship at Georgetown University’s School of Foreign Service. He taught both economics and international relations at the United States Military Academy in the mid-1980s and, after leaving government in late 2012, he was Co-Chairman of a Council on Foreign Relations Task Force on North America and a visiting professor of public policy at the City University of New York’s Macaulay Honors College for 3-1/2 years.

After General Petraeus’ retirement from the military, following confirmation by the Senate by a vote of 94-0, he served as Director of the CIA as the Agency played the central role in a number of achievements in the global war on terror, established a strategic campaign plan for the Agency, and pursued initiatives to invest additional resources in the Agency’s most important element, its human capital.

General Petraeus has been Chairman of the KKR Global Institute for over five years and a Partner with the firm for more than three-and-a-half years. He is also a member of the board of Optiv (a global provider of cyber security services), a Judge Widney Professor at the University of Southern California, a Senior Fellow at Harvard University’s Belfer Center, the Senior Vice President of the Royal United Services Institute, the Co-Chairman of the Woodrow Wilson Center’s Global Advisory Council, and a member of the boards of several other think tanks and over a dozen veterans service organizations.



Jeff Roe

Founder & CEO
Axiom Strategies

Jeff is the founder and CEO of Axiom Strategies, a firm specializing in strategic consulting, direct voter contact and research services for congressional, senatorial and statewide campaigns. Axiom was founded in Kansas City, Missouri in 2005. Axiom Strategies is the fastest-growing and largest General Consulting political firm in the nation. Roe is best known for his data-driven and bare-knuckled approach to politics as well as his role as campaign manager for Ted Cruz's 2016 run for president.

Axiom has helped elect 74 congressmen, 8 senators and 6 governors nationwide. In addition to political and ballot initiative campaigns, Jeff's team regularly consults and provides crisis management to 8 Fortune 500 companies and over 20 public corporations on federal, state and local issues.

In 2016, Fox News Sunday's Chris Wallace proclaimed Jeff was the "man behind the secret to Ted Cruz's ground game." Jeff is famous for his attention to detail and his strategic focus on the science of messaging, such as the Houston Chronicle explains, his desire to "keep a piece of campaign literature in a targeted voter's hands for 48 seconds or more – instead of the industry average of 24 seconds – before it goes in the trash." Others have noted that Ted Cruz's campaign was perhaps "the most sophisticated" the first in the nation caucus state had ever witnessed. On MSNBC, pundits covering the 2016 primary said that Jeff Roe has become the 'rock star' in politics created each cycle to the likes of Lee Atwater, James Carville and David Plouffe. According to the Washington Post, "Ted Cruz ran the best campaign of any Republican politician in the 2016 primary."

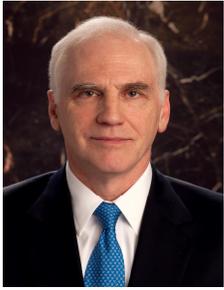
Jeff's political career began at the ground level, working for then-State Representative Sam Graves in 1994, helping to elect him to State Senate and eventually Congress in 2000, after which he became Graves' Chief of Staff. In 2001-02 Jeff helped Missouri Republicans take over the General Assembly for the first time in 50 years.

Axiom debuted on the Presidential level in 2008, when Jeff assisted Arkansas Governor Mike Huckabee with a massive voter ID effort in dozens of states including Iowa, South Carolina, Florida and the Super Tuesday States. In 2012, Jeff was a consultant to Gov. Rick Perry's Presidential campaign before ending the Presidential cycle assisting Newt Gingrich.

In 2010, Axiom added a Washington DC office and grew in staff and offices further in 2015 to include San Francisco and Austin. In 2017, Axiom opened an office in Annapolis and also dramatically expanded its West Coast presence, opening offices in Sacramento, San Diego and Seattle.

A Brookfield, Missouri native, Jeff grew up working on his family's hog farm, was an Eagle Scout and joined the Army National Guard at the age of 17. He attended basic training at Ft. Still, Oklahoma and served in a 155 mm Howitzer Unit in South Korea.

He graduated from Northwest Missouri State University in Maryville. He and his wife, Melissa, live in Houston with their daughters, Remington and Reagan, and son, Rockwell. They are members of Houston's First Baptist Church.



Daniel Tarullo

Former Federal Reserve Governor & Nomura Professor of International Financial Regulatory Practice
Harvard Law School

Daniel K. Tarullo served as a member of the Federal Reserve Board and the Federal Open Market Committee from January 2009 to April 2017. As oversight governor for supervision and regulation, he led the Board's financial regulatory reforms, including implementation of the Dodd-Frank Act. He was the Federal Reserve's representative to the international Financial Stability Board, including four years as chair of its Committee on Supervision and Regulation. From 2015 to 2017 he was also Chair of the interagency Federal Financial Institutions Examination Council. In his monetary policy-making role on the Federal Open Market Committee, he often focused on developments in labor markets and on the relationship between monetary policy and financial stability.

Tarullo had extensive government and academic experience prior to his nomination to the Federal Reserve. From 1993 to 1998, he served, successively, as Assistant Secretary of State for Economic and Business affairs, Deputy Assistant to the President for Economic Policy, and Assistant to the President for International Economic Policy. He was a principal on both the National Economic Council and the National Security Council. From 1995 to 1998, Tarullo was also President Bill Clinton's personal representative (sherpa) to the G7 group of industrialized nations. Immediately before joining the Clinton administration, he served as Chief Employment Counsel on the staff of Senator Edward M. Kennedy, and practiced law in Washington, D.C. He had previously worked in the Antitrust Division of the Department of Justice and as special assistant to the Undersecretary of Commerce.

Between periods of government service, Tarullo has taught for more than fifteen years at Georgetown and Harvard law schools. He was also a visiting professor at Princeton and at the University of Basel. His scholarship ranges widely over the areas of financial regulation, international economic law, and administrative law. His book *Banking on Basel* warned of risks being created by the changes in financial regulation that were put in place in the decade preceding the 2008-2009 financial crisis.