



Our 16th 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.



Adam Rozenwajg
Managing Partner
Goehring & Rozenwajg



Dan Clifton
Head of Policy Research
Strategas



Thomas Hoenig
Distinguished Senior Fellow
at the Mercatus Center at
George Mason University



Jitania Kandhari
Deputy CIO of the Solutions
and Multi-Asset Group
Morgan Stanley



Jeff Korzenik
Managing Director, Chief
Economist
Fifth Third Commercial Bank



Don Rissmiller
Chief Economist
Strategas



Amlan Roy
Founder, Global Macro
Demographics & Author
"Demographics Unravelled".



Zach Schreiber
Chairman, Chief Executive
Officer and Chief Investment
Officer
PointState Capital



Senator Pat Toomey
Former Senator



Chris Verrone
Head of Technical Analysis
Strategas



Thursday, March 16, 2023

07:45 AM to 08:30 AM
NYAC, 9th floor

Registration and Breakfast

08:30 AM to 09:15 AM

Fireside Chat with Zach Schreiber & Chris Verrone

• **Zach Schreiber**

Chairman, Chief Executive Officer and Chief Investment Officer
PointState Capital

• **Chris Verrone**

Head of Technical Analysis
Strategas

09:15 AM to 09:30 AM

Break

09:30 AM to 10:15 AM

Monetary Policy and It's Ever-evolving Framework

• **Thomas Hoenig**

Distinguished Senior Fellow at the Mercatus Center at George Mason University

10:15 AM to 10:30 AM

Break

10:30 AM to 11:15 AM

Emerging Markets

• **Jitania Kandhari**

Deputy CIO of the Solutions and Multi-Asset Group
Morgan Stanley

11:15 AM to 12:00 PM

The Labor Shortage and its Solutions

• **Jeff Korzenik**

Managing Director, Chief Economist
Fifth Third Commercial Bank

12:00 PM to 12:15 PM

Break

Please make your way to the Main Dining Room on the 11th Floor

12:15 PM to 01:15 PM

Fireside Chat with Senator Pat Toomey & Don Rissmiller

Main Dining Room, 11th Floor

Lunch will be served during this session.

• **Senator Pat Toomey**

Former Senator



- **Don Rissmiller**

Chief Economist
Strategas

01:15 PM to 01:30 PM
NYAC, 9th floor

Break

Please return to the 9th floor

01:30 PM to 02:15 PM

Why Demographics Matter for Economies and Investments

- **Amlan Roy**

Founder, Global Macro Demographics & Author “Demographics Unravelled”.

02:15 PM to 03:00 PM

Energy

- **Adam Rozenchwajg**

Managing Partner
Goehring & Rozenchwajg

03:00 PM to 03:15 PM

Break

03:15 PM to 04:00 PM

Cocktails with Clifton

- **Dan Clifton**

Head of Policy Research
Strategas

SPEAKERS



Adam Rozencwajg

Managing Partner
Goehring & Rozencwajg

Mr. Rozencwajg has 15 years of investment experience. Between 2007 and 2015, Mr. Rozencwajg worked exclusively on the Global Natural Resources Fund at Chilton Investment Company with Mr. Goehring.

Prior to joining Chilton Investment Company, Mr. Rozencwajg worked in the Investment Banking department at Lehman Brothers between 2006 and 2007.

Mr. Rozencwajg holds a Bachelor of Arts degree with a major in Economics/Philosophy from Columbia University.

Mr. Rozencwajg is a CFA charter-holder.



Dan Clifton

Head of Policy Research
Strategas

Daniel Clifton is a Partner and Head of Policy Research for Strategas Securities. In this capacity, Mr. Clifton evaluates the financial market implications of policy and political developments. This includes analyzing trade, tax, healthcare, energy, and other policy initiatives to determine how public policy changes impact the economy and financial markets for institutional investors.

Since opening up the Washington office for Strategas, Daniel has led one of the top ranked Washington policy teams on Wall Street in each of the past 12 years according to *Institutional Investor* magazine. Daniel is also a top ranked analyst in the category of Tax and Accounting Policy.

Mr. Clifton's research on the interaction between policy, elections, and financial markets is widely cited in the media and Daniel is a frequent guest on CNBC, Bloomberg, and Fox Business.

Prior to joining Strategas, Mr. Clifton was Executive Director of the American Shareholders Association (ASA), a non-partisan, non-profit organization which analyzes public policy affecting shareholders. In this capacity, Daniel was part of coalitions that successfully lowered capital gains and dividend tax rates to 15 percent in 2003, a repatriation tax holiday on foreign source revenue in 2004, and reform of the nation's private-sector pension system.

Prior to joining ASA, Mr. Clifton lobbied for tax reform and served as a senior staff member in two gubernatorial administrations working on economic and fiscal policy issues. Daniel has also worked in various capacities on elections at federal, state, and local levels.

Mr. Clifton received both his BA in Urban Planning and his MS in Public Policy from Rutgers University where he was a Fellow at the Eagleton Institute of Politics and a Harold Martin Fellow for Public Policy.



Thomas Hoenig

Distinguished Senior Fellow at the Mercatus Center at George Mason University

Thomas Hoenig is a Distinguished Senior Fellow at the Mercatus Center at George Mason University. Prior to joining the Mercatus Center, Mr. Hoenig served as Vice Chairman of the Federal Deposit Insurance Corporation from 2012 until 2018. In that capacity, he oversaw FDIC operations and policy related to deposit insurance pricing, bank supervision, and financial stability and bank resolution. He served as Director of NeighborWorks America, which was established by Congress in 1978 to address housing issues nationwide. He also served as a member of the International Association of Deposit Insurers' board from 2012 to 2017, and as the President and Chairman from October 2015 to October 2017.

Previously, Mr. Hoenig was President and Chief Executive Officer of the Federal Reserve Bank of Kansas City and a member of the Federal Reserve System's Federal Open Market Committee from 1991 to 2011. Mr. Hoenig was with the Federal Reserve for 38 years, beginning as an economist and then as a senior officer in banking supervision. As President and Chief Executive Officer, he led the Federal Reserve Bank of Kansas City during the Great Recession and the banking crisis of 2008 and 2009.

During his time with the Federal Reserve, Mr. Hoenig chaired several key committees including the Conference of Presidents, the Committee on Bank Supervision, Regulation and Legislation, and the Information Technology Oversight Committee. Also, during his tenure Mr. Hoenig organized and hosted the Federal Reserve Bank of Kansas City's Jackson Hole economic symposium for global central bankers.

Mr. Hoenig is from Fort Madison, Iowa and received a doctorate in economics from Iowa State University.



Jitania Kandhari

Deputy CIO of the Solutions and Multi-Asset Group
Morgan Stanley

Jitania is the Deputy CIO of the Solutions and Multi-Asset Group, Portfolio manager for the Active International Allocation strategy, and Head of Macro and Thematic Group for the Emerging Markets Equity team at Morgan Stanley. She joined Morgan Stanley in 2006 and has 25 years of investment experience in global macro economics, country and market analytics, currencies and thematic investments. Jitania was named in Citywire's Top 20 female portfolio managers in the US for 2021. Prior to joining the firm, Jitania was an associate Vice President in private banking at ABN Amro (Royal Bank of Scotland). Jitania began her career in India at First Global Securities in Indian equities and then joined the securities broking and investment banking at Kotak Securities in equity research and sales. She holds a Bachelor of Commerce degree in advanced financial and management accounting and a Master in Management Studies in finance, both from the University of Mumbai.



Jeff Korzenik

Managing Director, Chief Economist
Fifth Third Commercial Bank

Jeff Korzenik is the Chief Economist for Fifth Third Commercial Bank. As Chief Economist, Jeff provides research and analysis that impacts the Bank's key markets as well as business leaders and policymakers throughout the country.

He is an award-winning author whose writings have been featured in the Harvard Business Review, Newsweek, Forbes and many other national and regional publications, and Jeff has appeared regularly on CNBC, Bloomberg and Fox Business News.

Policymakers have sought his expertise on a variety of topics leading to his testifying before state legislatures and on Capitol Hill. Most recently, Jeff has been lauded as a leading expert on private sector models for hiring people with criminal records and advancing public safety through employment. Jeff is a graduate of Princeton University.



Don Rissmiller

Chief Economist
Strategas

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 has been a winner of their economic forecasting competition. He also serves on the board of the Global Interdependence Center (GIC) based in Philadelphia, and was the chair from 2018-2019.

Mr. Rissmiller's research has been consistently recognized by *Institutional Investor* in their annual survey. Mr. Rissmiller holds an AB magna cum laude in Economics from Harvard.



Amlan Roy

Founder, Global Macro Demographics & Author “Demographics Unravelled”.

Amlan Roy is an experienced Global Macro-Finance Researcher & Thought Leader specialising in Global Macroeconomics & Demographics. His book “Demographics Unravelled” published by Wiley in Jan 2022 was mentioned by the FT as one of the best new books in Economics. He is a keynote speaker and advisor who has engaged with institutional clients in the across 30+ countries He is also a Research Associate at two LSE Research Centres—the Financial Markets Group and Systemic Risk Centre. He is also an elected Honorary Fellow of the Institute and Faculty of Actuaries.

He founded Global Macro Demographics in July 2021. Previously over April 2019-June 2021, he was Head of Global Macro Research and Senior MD with State Street Global Advisors (the 3rd largest global asset manager). Prior to that he was Chief Retirement Strategist. He was MD and Head of Global Demographics & Pensions Research with Credit Suisse Investment Bank 1998-2016. In a prior role within CS, as a global EM strategist, he developed global risk & allocation models as an expert on Financial Architecture during the Asian & Russian crises.

Amlan spent a decade in academia with a distinguished teaching career in the US and UK. He was UK ESRC Research Fellow, Ponders Fellow, a Boston University Doctoral Scholar and a Government of India National Scholar. He has a PhD and MA in Financial Economics from the University of Iowa, an MBA from Indian Institute of Management, Ahmedabad and an undergraduate Economics with Honours degree from St. Stephen’s College, University of Delhi.



Zach Schreiber

Chairman, Chief Executive Officer and Chief Investment Officer
PointState Capital

Zach Schreiber co-founded PointState Capital in 2011 and is responsible for portfolio management and construction of investments across a variety of asset classes and sectors. Prior to PointState, Mr. Schreiber was a Managing Director with Duquesne Capital Management, L.L.C., where he was responsible for investments in power, utilities, commodities and commodities-related industries. Mr. Schreiber joined Duquesne in September 2002. Before joining Duquesne, Mr. Schreiber was a senior analyst at SILCAP/ Bass Brothers Trading from September 1996 through August 2002. Mr. Schreiber graduated from Brown University in 1995 with a B.A. in International Relations.



Senator Pat Toomey

Former Senator

Senator Pat Toomey represented Pennsylvania in the U.S. Senate from 2011 to 2023.

Sought out by his colleagues for his views on economic policy, financial regulation, and budgetary issues, Senator Toomey was labeled by the Philadelphia Inquirer as “a leading voice on money matters.”

During his time in the Senate, Senator Toomey successfully led efforts to cut taxes for families, make our business tax code more competitive, reduce wasteful federal spending, and protect children from abusers.

The senator served on the Senate’s Budget; Finance; and Banking committees. On Banking, Senator Toomey served as the senior-most Republican, leading efforts to block radical nominees, restore disciplined monetary policy, and establish a regulatory framework for crypto currencies.

Senator Toomey previously served in the U.S. House of Representatives for six years. Honoring his pledge to limit himself to three terms, he did not seek re-election to the House in 2004.

In addition to his public service, the senator has also worked in the financial services industry, served as president of the Club for Growth, and owned and operated a small restaurant chain in the Lehigh Valley with his brothers.

A graduate of Harvard University, he lives in the Lehigh Valley with his wife, Kris, and their three children.

Senator Toomey has been a frequent guest on CNBC, NBC, Bloomberg, FOX and FOX Business. His editorials have appeared in the Wall Street Journal, The Washington Post and The Philadelphia Inquirer, among many other publications. He has over 190,000 Twitter followers.



Chris Verrone

Head of Technical Analysis
Strategas

Mr. Verrone is a partner of Strategas and is the head of the Firm's Technical Strategy & Macro Research team. He is also a member of the Firm's Asset Allocation and Investment Policy committee. His regularly published research highlights actionable investment opportunities across the equity, commodity, foreign exchange, and fixed income markets.

Chris is a frequent guest on CNBC, Bloomberg Television, and Fox Business, and is often quoted in the domestic and foreign financial press. He has consistently ranked among the top macro analysts on Wall Street in the annual All-America Research Survey by Institutional Investor magazine over the last decade, and is particularly known for combining a rigorous examination of financial history with empirically driven analysis.

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 an MA in Political Science from Villanova University and a BA in International Political Economy, also from Villanova. He is also active with the Delbarton School Alumni Association. Chris, his wife, Caroline, and their three children, Maggie, Reagan, and Connor reside in Connecticut.

Accommodations

New York Athletic Club
180 Central Park S, New York, NY
10019

Room block: New York Athletic Club

Rate: \$275

Please reference: Strategas room block

Phone - 212-767-7000; Press 3 for the front desk.

The front desk will be able to book the rooms.