



9th Annual Investment Forum



Ben Royce

Information & Knowledge
Strategy; Lecturer, Columbia
University



Jenny Radcliffe

People Hacker and Social
Engineer



Daniel Clifton

Head of Policy Research
Strategas



Nicholas Bohnsack

Head of Portfolio Strategy
Strategas



Jason De Sena Trennert

Chief Investment Strategist
Strategas



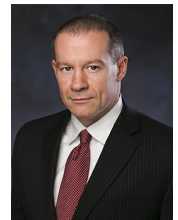
Don Rissmiller

Chief Economist
Strategas



Chris Verrone

Head of Technical Analysis
Strategas



Tom Tzitzouris

Fixed Income Strategist
Strategas

Thursday, September 28, 2023

06:30 PM to 09:30 PM

Rosewood - Harrington Terrace

Welcome Cocktail Reception**Friday, September 29, 2023**

07:00 AM to 08:00 AM

Rosewood - Soncy/Chelston

Breakfast

08:00 AM to 09:00 AM

AI: What Big Tech and Academia Won't Tell You

- **Ben Royce**

Business Development, Cloud AI at Google
Information & Knowledge Strategy; Lecturer, Columbia University

09:00 AM to 10:00 AM

Strategas Analyst Panel I - The Economy & Fixed Income Markets After a Year of Uncertainty: Where To From Here?

- **Don Rissmiller**

Chief Economist
Strategas

- **Tom Tzitzouris**

Fixed Income Strategist
Strategas

10:00 AM to 12:00 PM

Investment Roundtable Session I

12:00 PM to 05:00 PM

Various locations

Various group activities

Guests can choose from golf, tennis, Bermuda cave tour or an island boat cruise.

06:45 PM to 09:00 PM

Rosewood - Croquet Lawn

Adventures in Social Engineering.... Tales of a "People Hacker"

- **Jenny Radcliffe**

People Hacker and Social Engineer



Saturday, September 30, 2023

07:00 AM to 08:00 AM

Rosewood - Soncy/Chelston

Breakfast

08:00 AM to 09:00 AM

Strategas Analyst Panel II - Eye of the Storm or New Bull Market?

- **Jason De Sena Trennert**
Chief Investment Strategist
Strategas
-

- **Nicholas Bohnsack**
Head of Portfolio Strategy
Strategas
-

- **Chris Verrone**
Head of Technical Analysis
Strategas
-

09:15 AM to 11:45 AM

Investment Roundtable Session II

11:45 AM to 12:00 PM

Break

12:00 PM to 01:00 PM

Disequilibrium: Policy, Politics, and the Path to the 2024 Election

- **Daniel Clifton**
Head of Policy Research
Strategas
-

06:30 PM to 09:00 PM

Sul Verde at Rosewood's Golf Club

Social Cocktails and Dinner

Sunday, October 1, 2023

07:00 AM to 10:00 PM

Rosewood

Guest departures

SPEAKERS



Ben Royce

Business Development, Cloud AI at Google
Information & Knowledge Strategy; Lecturer, Columbia University

At Google, Ben Royce prototypes new products using machine learning and data science techniques to find insights about how users consume and interpret advertising. Formerly, he was the Senior Vice President of Search and Data Science at Publicis Worldwide where he worked with clients such as Procter and Gamble, Citibank, Heineken, and Merck.

Education

M.S., Columbia University

Master Certificate, University of San Francisco

B.S., University of Wisconsin-Milwaukee



Jenny Radcliffe

People Hacker and Social Engineer

Jenny Radcliffe A.K.A "The People Hacker," is a world renowned Social Engineer, hired to bypass security systems through a mixture of psychology, con-artistry, cunning and guile. A "burglar" for hire and entertaining educator, she has spent a lifetime talking her way into secure locations, protecting clients from scammers, and leading simulated criminal attacks on organisations of all sizes in order to help secure money, data and information from malicious attacks.

Radcliffe uses a combination of anecdotes, science, and humour to share lessons that help executives better read people and understand social clues, use subtle tactics to persuade others during negotiations, open up avenues of conversation that were formerly shut, and understand and protect against their own vulnerabilities.

Jenny has received many industry awards and was most recently inducted into the prestigious InfoSec Hall of Fame in 2022. She has also been named as one of the top 30 female cyber security leaders in 2022 by SC Magazine, one of the top 25 Women in Cyber by IT Security Guru, and as a Top 50 Women of Influence in Cyber in 2019. She was nominated in seven categories for the 2021 Security Serious Awards in 2021 including the prestigious "Godmother of Security" award in 2020 winning the "Most Educational Security Blog" for her show The Human Factor podcast interviewing industry leaders, bloggers, experts, fellow social engineers and con-artists about all elements of security and preventing people from becoming victims of malicious social engineering.

Jenny is a sought-after global keynote speaker at major conferences and corporate events and is a multiple TEDx contributor. A go-to guest expert on the human element of security, scams, cons and hacks, she has appeared on numerous television and radio shows, as well as online media and traditional press outlets, and helps create unique content for international brands and organisations. An experienced podcast host, panel chair and interviewer she hosted the live weekly cyber talkshow "Teiss Talk" for two years and is frequently asked to chair live events for clients both virtually and in-person.

Jenny's is the author of the book *People Hacker: Confessions of a Burglar for Hire*, published by Simon and Schuster in Europe in February 23.



Daniel

Daniel Clifton

Head of Policy Research
Strategas



Nicholas Bohnsack

Head of Portfolio Strategy
Strategas

Mr. Bohnsack co-founded Strategas in 2006 and serves as the President and Chief Operating Officer of the Firm. He leads the Firm's Institutional Securities businesses, with enterprise responsibility for Macro Research, Sales & Trading, and oversight of the Firm's Finance, Compliance, Technology, and Operations units.

In addition to heading the Firm's Institutional Securities business he also serves as the Chief Executive Officer of Strategas Asset Management, the Firm's \$400 million (AUM/A) macro thematic managed strategies business.

Mr. Bohnsack directs the Firm's Global Asset Allocation and Portfolio Strategy research efforts, and chairs its Investment Policy Committee. 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. Nicholas and his wife, Brooke, live in New York with their three sons.



Jason De Sena Trennert

Chief Investment Strategist
Strategas

Mr. Trennert is the Chairman of Strategas and its related companies and the Chief Executive of the Firm's institutional broker-dealer, Strategas Securities. 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 salespeople, sales traders, and capital markets professionals 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 on business news programs broadcast by CNBC, CNBC Italia, Fox Business News, and Bloomberg TV, among others. He is the author of three books about investing and the investment business. *My Side of the Street* was published by St. Martin's Press in May 2015. He has penned several op-eds for *The Wall Street Journal*, *the Financial Times*, and *Investor's Business Daily*.

Mr. Trennert's two most notable calls involved coining the phrase "TINA" as it relates to equities in a world of perpetually low interest rates and his early recognition of the potential allure of Donald Trump as a presidential candidate. His op-ed "The Stock Market and 'The TINA' Factor" was published in *The Wall Street Journal* in April 2013. "What the Donald Got Right" was published in *Investor's Business Daily* in May 2011. His piece "Donald Trump is Underowned" appeared on the website *Real Clear Markets* in August 2015. Mr. Trennert credits his often out-of-consensus calls to his frequent travels to visit clients in 44 states and 20 foreign countries.

He is committed to a number of Italian, Italian-American, and Catholic causes in New York and abroad. Mr. Trennert is a member of the investment committee of the Rockefeller Brothers Fund and sits on the advisory board at Hollow Brook Wealth Management LLC.

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



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.



Tom Tzitzouris

Fixed Income Strategist
Strategas

Mr. Tzitzouris is a Director at Strategas, directing the Firm's fixed income research efforts. His work touches on all aspects of broad market fixed income strategy, as well as clients' asset/liability management needs.

His focus includes interest rate and credit term structure strategies, callable bond analysis, sector relative value research, and valuation analysis for Treasury, Agency, and high grade corporates.

Prior to joining Strategas, Mr. Tzitzouris worked as a senior analyst at Fannie Mae, leading Fannie's independent debt valuation team, and had previously spent time as a debt and derivatives analyst at Freddie Mac.

Mr. Tzitzouris began his career as a quantitative research analyst with JPMorgan Asset Management's fixed income group. Mr. Tzitzouris holds a BS in Finance from Bryant University, an MS in Mathematics from Fairfield University, and an MA in Economics from George Mason University.

Accommodations

Rosewood Bermuda
60 Tucker's Point Dr., Hamilton
Parish, HS 02 Bermuda

Strategas room block: \$675. Please contact elizabeth.kortum@rosewoodhotels.com and copy Bermuda Reservations at bermuda.Reservations@rosewoodhotels.com to book your reservation.