



STRATEGAS

10th Annual Investment Forum

Rosewood Bermuda

Thursday, September 26, 2024 - Sunday, September 29, 2024



Bob Ballard

Ocean Explorer and Scientist



Nicholas Bohnsack

Head of Portfolio Strategy
Strategas



Daniel Clifton

Head of Policy Research
Strategas



Jason De Sena Trennert

Chief Investment Strategist
Strategas



Don Rissmiller

Chief Economist
Strategas



Tom Tzitzouris

Fixed Income Strategist
Strategas



Chris Verrone

Head of Technical Analysis &
Macro Research
Strategas



Thursday, September 26, 2024

06:30 PM to 09:30 PM

Rosewood - Harrington Terrace

Welcome Cocktail Reception

Friday, September 27, 2024

07:00 AM to 08:00 AM

Rosewood - Soncy/Chelston

Breakfast

08:00 AM to 09:00 AM

Hold for outside speaker

09:00 AM to 10:00 AM

Strategas Analyst Panel I

- **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 group activities - To be announced.

Rosewood - Harrington Terrace

06:45 PM to 09:00 PM

Rosewood - Croquet Lawn

The Personal Account of How the Titanic Was Found, and a Look into the Future

- **Bob Ballard**

Ocean Explorer and Scientist



Saturday, September 28, 2024

08:00 AM to 09:00 AM

Rosewood - Soncy/Chelston

Breakfast

08:00 AM to 09:00 AM

Strategas Analyst Panel II

- **Jason De Sena Trennert**

Chief Investment Strategist
Strategas

- **Nicholas Bohnsack**

Head of Portfolio Strategy
Strategas

- **Chris Verrone**

Head of Technical Analysis & Macro Research
Strategas

11:45 AM to 12:00 PM

Break

12:00 PM to 01:00 PM

The US Presidential 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, September 29, 2024

08:00 AM to 06:00 PM

Rosewood lobby

Guest departures



SPEAKERS



Bob Ballard

Ocean Explorer and Scientist

Robert Ballard, a legendary ocean explorer and scientist, offers a captivating voyage into the mysteries of the deep sea and the incredible discoveries hidden beneath the waves. With a distinguished career that includes uncovering the wrecks of the RMS Titanic and the USS Yorktown, Dr. Ballard is a pioneer in underwater archaeology and exploration.

His presentations are a thrilling blend of scientific exploration, adventure, and the wonders of the natural world. Audiences can expect to embark on a virtual deep-sea expedition, gaining a profound understanding of the uncharted realms of our planet. Dr. Ballard's approach is characterized by a passion for discovery and a commitment to environmental conservation, making his talks not only educational but also deeply inspiring.

Whether discussing the exploration of hydrothermal vents, the search for lost shipwrecks, or the preservation of our oceans, Robert Ballard's presentations leave a lasting impact. Hiring him as a speaker is an opportunity to ignite curiosity, foster a sense of wonder, and instill a greater appreciation for the Earth's final frontier — the world's oceans.



Nicholas Bohnsack

Head of Portfolio Strategy
Strategas

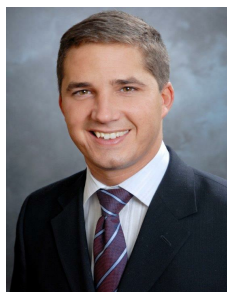
Mr. Bohnsack co-founded Strategas in 2006 and serves as the President and Chief Operating Officer of the Firm. He leads the Firm's Institutional Securities businesses, with enterprise responsibility for Macro Research, Sales & Trading, and oversight of the Firm's Finance, Compliance, Technology, and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



Daniel 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 tax, trade, infrastructure, healthcare, energy, defense and other policy initiatives to determine how public policy changes impact the economy and financial markets for institutional investors.

Daniel leads Strategas' Washington policy research team, which has been ranked as one of the top policy research teams on Wall Street for 14 consecutive years according to *Institutional Investor*. Mr. Clifton is also a top ranked analyst in the category of Tax and Accounting policy.

Currently, Daniel is ranked as the top *Independent* research analyst on Wall Street, across all research verticals, according to the same *Institutional Investor* survey.

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. Daniel also worked on tax policy issues prior to the ASA and has been involved in every major tax policy change over the past twenty years. Prior to moving to Washington, Mr. Clifton served as a senior staff member in two gubernatorial administrations working on economic and fiscal policy issues.

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.



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.



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.



Chris Verrone

Head of Technical Analysis & Macro Research
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

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

Strategas room block: \$675. Please contact
bermuda.Reservations@rosewoodhotels.com to book your reservation.