

## Swan CIO Summit – April 2016

### Sunday, April 03, 2016

7:00 pm to 9:00 pm | **Registration and Reception** (*East Veranda – 2<sup>nd</sup> Floor*)

### Monday, April 04, 2016

7:30 am to 8:30 am | **Breakfast** (*Patio Del Fauno West Veranda – off main Del Fauno Center*)

*Note – dress code is business casual*

8:30 am to 8:45 am | **Welcome and Introduction to Swan CIO Summit** (*Del Fauno Center*)

*Rob Swan, Co-Portfolio Manager – Swan Global Investments*

8:45 am to 9:30 am | **Changing Landscape: Defining and Managing Risk with Options**

*Panel Discussion: Convergenx, OIC, WallechBeth Capital*

9:30 am to 10:00 am | **Past, Present and Future of Swan**

*Randy Swan, President / Founder / Portfolio Manager – Swan Global Investments*

10:00 am to 10:15 am | **Break**

10:15 am to 11:00 am | **Rules-Based Sector Rotation Strategies**

*Sam Stovall, US Equity Strategist – S&P Capital IQ*

11:00 am to 11:45 am | **S&P Select SPDRs –Select Sectors and Equal-weighting**

*Jared Rowley, CFA – Equity Strategist – State Street Global Advisors*

11:45 am to 1:00 pm | **Lunch**

*(12:30pm – 1:00pm) Keynote address by Jose Perez-Riera, Former Secretary of Economic Development and Commerce of Puerto Rico*

1:05 pm to 2:20 pm | **Role of Alternatives: Addressing Investors' Critical Needs and Outcomes**

*Panel Discussion:*

*John Thompson, Partner/Head of Institutional Advisory Services – AON Hewitt*

*Don Robinson, CEO and Co-CIO – Palladium, LLC*

*Kevin Malone, President and CIO – Greenrock Research*

2:20 pm to 2:35 pm	<b>Break</b>
2:35 pm to 3:35 pm	<b>Solving the Retirement Conundrum – Untying the Gordian Knot</b> <i>Marc Odo, Director of Investment Solutions – Swan Global Investments</i>
3:35 pm to 4:15 pm	<b>The Target Date Dilemma – Solving BIG problems facing 401k plans</b> <i>Joe Gordon, Founder/Managing Partner – Gordon Asset Management</i>
4:15 pm	<b>Adjourn</b>
5:00 pm to 6:30 pm	<b>Reception</b> ( <i>West Veranda – off the Salon Dorado</i> )
6:30 pm	<b>Dinner</b> ( <i>Salon Dorado</i> )

**Tuesday, April 05, 2016**

7:30 am to 8:30 am	<b>Breakfast</b>
8:30 am to 9:15 am	<b>MSCI Index Methodology and Market Classification</b> <i>Paul Riccardella, Executive Director – MSCI</i>
9:15 am to 10:00 am	<b>New Asset Classes - International Equities and the Changing Global Landscape</b> <i>John Hyland, Head of ETF Investment Strategist – BlackRock</i>
10:00 am to 10:15 am	<b>Break</b>
10:15 am to 11:00 am	<b>Rethinking the Math Behind Investment Returns</b> <i>Micah Wakefield, Director of Research – Swan Global Investments</i>
11:00 am to 11:50 am	<b>Insight From the Portfolio Managers – Chat with Randy &amp; Rob</b> <i>Randy Swan, President / Founder / PM &amp; Rob Swan, Co-Portfolio Manager</i>
11:50 am to 12:00 pm	<b>CIO Summit Closing and Farewell</b>
12:00 pm to 1:00 pm	<b>Grab and Go Lunch</b>