

ADVISOR SUMMIT

FEBRUARY 7, 2017 | BEVERLY HILLS, CA | THE BEVERLY HILTON

CFP BOARD



EVENT ACCEPTED FOR 3.5 CONTINUING EDUCATION CREDITS

CEF FUNDAMENTALS: BUILDING INCOME

8:30 - 9:00 AM	<p>Registration</p>
9:00 - 9:10 AM	<p>Welcome</p> <p>Michael Hedstrom, Director — CEFA</p> <p>Jon Diorio, Managing Director — BlackRock</p>
9:10 - 10:00 AM	<p>CEF Trends & Opportunity: Incorporating CEFs in Your Portfolio</p> <p><i>Moderator: Jon Diorio, Managing Director — BlackRock</i></p> <p>Anne Kritzmire, Managing Director, Closed-End Funds & Global Structured Products — Nuveen Investments</p> <p>Jonathan Morgan, President & CEO — Canadian General Investments, Ltd.</p>
10:00 - 10:50 AM	<p>Finding Income in a Low-Yield Environment</p> <p><i>Moderator: Stephen Minar, Vice President, Closed-End Funds — BlackRock</i></p> <p>Chris Kilpatrick, Portfolio Manager — Western Asset (Legg Mason)</p> <p>F. Barry Nelson, CFA, Partner — Advent Capital Management</p> <p>Purva Patel, CIMA®, Senior Vice President, Client Portfolio Manager — Nuveen Investments</p>
10:50 - 11:00 AM	<p>Break</p>
11:00 AM - 12:00 PM	<p>Exploring Alternative Investment Opportunities</p> <p><i>Moderator: Renee Baker, Senior Manager, Closed-End Funds & Investor Relations — Aberdeen Asset Management</i></p> <p>Real Assets/Infrastructure</p> <p>Larry Antonatos, Managing Director, Portfolio Manager — Brookfield Investment Management</p> <p>Energy & MLPs</p> <p>Brian Sulley, Vice President — Tortoise Capital Advisors</p> <p>BDCs</p> <p>Thomas Alonso, CFA, Vice President of Investor Relations — Prospect Capital Corporation</p>



12:00- 12:45 PM
Luncheon

Keynote Address:

Where Are We Going? Central Bank Policy and Global Growth

John Bellows, PhD, CFA, Portfolio Manager — Western Asset (Legg Mason)



Conclusion

Continuing Education Credit Certification

At the conclusion of the event, continuing education participants will receive a certificate of completion. This event has been accepted for 3.5 CE Credit hours by the CFP Board and by IMCA for credit towards the CIMA®, CIMC® and CPWA® certifications.

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