

# ADVISOR SUMMIT

SEPTEMBER 20, 2017 | CHICAGO, IL



ACCEPTED FOR 4 CONTINUING EDUCATION CREDITS

## INCOME. DIVERSIFICATION. FLEXIBILITY.

At the Advisor Summit on Diversified Solutions you will hear leading institutional asset managers' outlook and analysis of several market sectors. From generating and managing an income stream for clients to alternative strategies in the closed-end fund (CEF) space, portfolio managers and CEF experts share insight about diversified solutions.

9:00 - 9:30 AM Registration & Networking

9:30 - 9:40 AM Welcome

**Rennie McConnochie**, Head of Global Banks — Aberdeen Standard Investments

9:40 - 10:30 AM CEF Trends & Opportunities: Incorporating CEFs in Your Portfolio

*Moderator:* **Anne Kritzmire**, Managing Director, Closed-End Funds & Global Structured Products — Nuveen  
**Lawrence Hooper, Jr.**, General Counsel & Chief Compliance Officer — Adams Funds  
**Robert Bush, Jr.**, Senior Vice President, Director of CEF Products — Calamos Investments  
**Jonathan Isaac**, Vice President, Director of Product Management — Eaton Vance

10:30 - 11:00 AM *Keynote Address* Perspectives on the Closed-End Fund Industry: Past, Present & Future

**John Calamos, Sr.**, Founder, Chairman & Global Chief Investment Officer — Calamos Investments

11:00 - 11:10 AM Break

11:10 AM - 12:00 PM Discovering Global Investment Opportunities

*Moderator:* **Rennie McConnochie**, Head of Global Banks — Aberdeen Standard Investments  
**D. Greg Eckel**, CFA, CPA, CGA, Senior Vice President & Portfolio Manager — Canadian General Investments, Ltd.  
**Mark Lindbloom**, Portfolio Manager — Western Asset



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12:00 - 12:40 PM | Lunch & Networking

12:40 - 1:30 PM | **Real Assets & Alternative Strategies:  
A Closer Look at Real Estate, Infrastructure & MLPs**

*Moderator:* **Mariana Bush**, CFA, Head of CEF/ETF Research — Wells Fargo Advisors  
**Larry Antonatos**, Managing Director, Portfolio Manager — Brookfield Investment Management  
**Steven Burton**, CFA, Co-CIO & Senior Global Portfolio Manager — CBRE Clarion Securities

1:30 - 2:20 PM | **Finding Income in a Low-Yield Environment**

*Moderator:* **Dave Lamb**, Managing Director, Distribution Management and Analysis — Nuveen  
**F. Barry Nelson**, CFA, Partner — Advent Capital Management  
**Thomas Alonso**, CFA, Vice President of Investor Relations — Prospect Capital Corporation

**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 4 CE Credit hours by the CFP Board and by IMCA for credit towards the CIMA®, CIMC® and CPWA® certifications.

## FEATURING



**Brookfield**

CALAMOS  
INVESTMENTS



GUGGENHEIM

LEGG MASON  
GLOBAL ASSET MANAGEMENT

**nuveen**



## PRESENTING PARTNER



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