

ADVISOR SUMMIT ON CLOSED-END FUNDS

FEBRUARY 27 | NEW YORK, NY | WESTIN NEW YORK TIMES SQUARE

EVENT ACCEPTED FOR 4.5 CE CREDITS

CFP BOARD

BUILDING RESILIENT PORTFOLIOS

8:30 - 9:00 AM

Registration & Networking

9:00 - 9:10 AM

Welcome

Tim Sullivan, Director — CEFA

Rennie McConnochie, Head of Global Banks — Aberdeen Standard Investments

9:10 - 10:00 AM

CEF Trends & Opportunity: Incorporating CEFs in Your Portfolio

Moderator: Mike Taggart, CFA, Vice President, Head of CEF Research — Nuveen

Rennie McConnochie, Head of Global Banks — Aberdeen Standard Investments

Lawrence Hooper, Vice President, General Counsel & Secretary — Adams Funds

Jonathan Isaac, Vice President, Closed-End Fund Specialist — Eaton Vance

10:00 - 10:50 AM

Finding Opportunities and Value in CEFs

Moderator: Mariana Bush, CFA, Head of CEF/ETF Research — Wells Fargo Advisors

Doug Bond, Executive Vice President & Portfolio Manager — Cohen & Steers

Jonathan Morgan, President & CEO — Canadian General Investments, Ltd.

10:50 - 11:00 AM

Break

11:00 - 11:45 AM

Keynote Address

The Pendulum Swings

Brian Wesbury, Chief Economist — First Trust

11:45 AM - 12:35 PM

Generating and Managing an Income Stream for Your Clients

Moderator: Alex Reiss, Director — Stifel

F. Barry Nelson, CFA, Partner — Advent Capital Management (Guggenheim)

Chris Eades, Portfolio Manager — ClearBridge Investments (Legg Mason)

Purva Patel, CIMA®, Senior Vice President, Client Portfolio Manager — Nuveen



12:35 - 12:50 PM

Break

12:50 - 1:40 PM

Luncheon

Alternative Strategies in the CEF Space

Moderator: **Elias Lanik**, Senior Closed-End Fund Analyst — BofA Merrill Lynch Global Research
Larry Antonatos, Managing Director, Portfolio Manager — Brookfield Investment Management
Ed Russell, Senior Managing Director — Tortoise

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 4.5 CE Credit hours by the CFP Board.

FEATURING



Brookfield



COHEN & STEERS



GUGGENHEIM

LEGG MASON
GLOBAL ASSET MANAGEMENT

nuveen



PRESENTING PARTNERS



STIFEL

