



THE PETER J. TOBIN
COLLEGE OF BUSINESS

**2nd Annual Investment
Management Conference**
March 31st 9:00 am—6:45 pm
Manhattan Campus

SCHEDULE

*A special thanks to
Ameriprise Financial
for its corporate sponsorship.*

9:00 AM—12:00 PM Registration/Check-in

9:00 AM—10:00 AM Continental Breakfast—2nd Floor Lobby

10:00 AM—11:05 AM Employers and Professional Certification—2nd Floor Auditorium

- *Financial Planning and the CFP: Bob Hill (Ameriprise Financial)*
- *CFP, ChFC, CLU, CFA: Bruce Ross (consultant for Chase Learning & Dev., NY Institute of Finance)*
- *Securities Licenses: Hal Geller (NASD)*

11:15 AM—12:20 AM A: Nationwide Undergraduate Investment Research Essay Competition – Room 123

- *Presentation and judging of contest submissions by the 3 Finalists*

11:15 AM—12:20 AM B: Portfolio Management & Construction—Auditorium

- *Fund of Funds—Past, Present, Future: Jeffrey Heisler (Gottex Fund Management)*
- *Design and Construction of the Fidelity Freedom Funds: Jonathan Shelon (Fidelity Investments)*

12:30 PM—1:15 PM Lunch— Cafeteria

1:15 PM — 2:15 PM Keynote Speaker, Announcement of Essay Competition Winners—Auditorium

- *Recognition of Essay Competition Winners: Dean Richard A. Highfield*
- *Keynote Address: Jonathan Shelon, Global Asset Allocation Portfolio Manager, Fidelity Management and Research*

2:20 PM—3:30 PM A: Current Trends in Commodities Markets/Trading—Room 123

- *Perspectives from the Commodities Exchange: Joseph O'Neill (SVP, Marketing, New York Board of Trade)*
- *Foreign Exchange Markets and Trading: Gregory Cotter (TriGlobal FX)*

2:20 PM—3:30 PM B: Uses of Financial Labs/Trading Rooms on College Campuses—Auditorium

- *Faculty and students from Bentley College's Hughey Center for Financial Services*

3:30 PM—3:40 PM Coffee Break

3:45 PM—5:30 PM NYSSA Career Program—Auditorium, Rooms 208 & 215

- *Eric Stieglitz (NYSSA), Hamilton Lin (Wall St. Training), John M. Eade (Argus Research), Kedrick Brown*

5:35 PM—5:45 PM Concluding Remarks: St. John's Faculty/Administration—Room 123

5:45 PM—6:45 PM Reception/Students Networking Opportunity—Room 123

Information/Employer Tables:

AFLAC

Becker Professional Review

Goldman Sachs

KForce

Northwest Mutual Financial

Sterling Equities

Wells Fargo

Ameriprise

CNA Insurance

HSBC

Lehman Brothers

Restoration Capital Management

U.S. Comptroller of the Currency

AXA Financial

First Investors

JP Morgan Chase

Morgan Stanley

State Street

Wall Street Services