

# 4th Annual Investment Conference

ALL PROCEEDS benefit financial literacy education for area youth through Make A Difference – Wisconsin



Make A Difference  
Wisconsin

Money Smart. Life Smart.

Wednesday, May 9th 2012

1:30 – 2:30 pm Registration | 2:30 – 5:00 pm Program | 5:00 pm Networking Reception  
Pfister Hotel | 424 E. Wisconsin Avenue | Milwaukee

## What investment insights will drive your decisions in 2012?

The speaker lineup for the 4th annual **Make A Difference-Wisconsin Investment Conference** promises another terrific afternoon for both the professional and individual investor. Modeled after *Wall Street Week* and the popular *Ira Sohn Investment Research Conference* in New York City, another must-hear panel is prepared to deliver top investment ideas and perspectives.

**Seating is limited and will sell out quickly, so don't delay. Register today!**



### Keynote speaker – James S. Chanos

Jim Chanos, founder and managing partner of Kynikos Associates LP, New York, headlines this year's conference. Throughout his investment career, Jim has identified and sold short the shares of numerous well-known corporate financial disasters. His celebrated short-sale of Enron shares was dubbed by *Barron's* as "the market call of the decade, if not the past fifty years." The media has noted his prescience in alerting finance ministers and others about the global financial crisis well before it occurred. His views are regularly covered by news organizations worldwide.

Jim opened Kynikos Associates LP, the world's largest exclusive short selling investment firm, after beginning his Wall Street career with Paine Webber, Gilford Securities, and Deutsche Bank. He also serves as chairman of the Coalition of Private Investment Companies. In that role, Jim has testified before Congress and provided comments to regulations proposed by the U.S. Securities and Exchange Commission and the Financial Services Authority in the United Kingdom. Born and raised in Milwaukee, he received his BA in economics and political science from Yale University.



#### Thomas C. Ognar, CFA Managing Director & Senior Portfolio Manager, Wells Capital Management

Thomas Ognar is a managing director and senior portfolio manager for the Heritage Growth Equity team.

He joined Wells Capital Management with the acquisition of assets from Strong Capital Management. Prior to Strong, he was a research analyst with M&I Investment Management and a trader with Republic Securities. Thomas earned a B.A. in finance from Miami University, an M.S. in finance from UW-Madison and is an alumnus of the Applied Security Analysis Program. He has been featured in various media outlets including *Barron's*, *USA Today*, *InvestmentNews*, *Investor's Business Daily*, and was named a 2011 Mutual Fund All-Star by *Fortune* magazine.



#### Joseph A. Frohna Founding Principal & Portfolio Manager, Growth Strategies / Co-Portfolio Manager, Core Alpha Strategy

Joe Frohna is a founding principal of 1492 Capital Management, LLC and lead manager of the 1492 growth strategy portfolios. He previously was the founder and CEO of Cortina Asset Management, a \$2 billion small cap asset management firm. Joe earned a bachelor's in Accounting from UW-Whitewater and an M.B.A. in Finance from the University of Michigan and is a CFA and CPA. Joe was recognized by *Barron's* as the second best portfolio manager in the country in 2001 and the sixth best in 2002. Joe has been a frequent media commentator in *The Wall Street Journal*, *Investors' Business Daily*, *Barron's*, *Smart Money*, and *Fortune*; and appeared on CNBC.



#### Richard Imperiale President & Chief Investment Officer, Uniplan Investment Counsel

Founded in 1984, Uniplan focuses on Real Estate Investment Trusts (REITs) and micro cap stocks. The firm has consistently ranked among the top managers on a risk-adjusted basis. In 2011 Uniplan was named Manager of the Year for its REIT portfolio by *Investment Advisor Magazine* and the Real Estate Fund received a Five Star ranking from Morningstar in 2009. He holds a B.S. in Finance from Marquette University and completed a postgraduate program at the University of Chicago. Rick is the author of Real Estate Investment Trusts: New Strategies for Portfolio Management and *The Micro Cap Investor: Strategies for Making Big Returns in Small Companies*.

Register online at <http://makeadifferencewisconsin.org> \$200 by April 20 | \$250 after April 20 | \$100 Make A Difference volunteers

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# Register today for the May 9th Investment Conference



Make A Difference – Wisconsin is a non-profit 501(c)3 organization dedicated to providing Milwaukee-area youth with the financial management tools needed for success. Funds raised from this event will allow Make A Difference – Wisconsin to mobilize a volunteer force of over 500 who will provide in-school financial education to thousands of local high school students. Your support provides financial education at a critical time of economic challenges and impacts both students' lives as well as the financial health of our community. A portion of your registration fee is tax deductible, as indicated on your online or mailed receipt.

Complete the form below and proceed to pay with a credit card. Or print this form and mail with your check, payable to Make A Difference-Wisconsin, 710 N. Plankinton Ave, Suite 310, Milwaukee, WI 53203

Name \_\_\_\_\_

Title \_\_\_\_\_ Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

*Number*

\_\_\_\_\_ Table Sponsor (reserved table of 8) x \$2,000 = \$ \_\_\_\_\_

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*Please list attendees:*

- |          |          |
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| 1. _____ | 5. _____ |
| 2. _____ | 6. _____ |
| 3. _____ | 7. _____ |
| 4. _____ | 8. _____ |

\_\_\_\_\_ Early-bird registrations on or before April 20th x \$200 = \$ \_\_\_\_\_

\_\_\_\_\_ Registrations after April 20th x \$250 = \$ \_\_\_\_\_

\_\_\_\_\_ 2011–2012 Make A Difference volunteer instructor x \$100 = \$ \_\_\_\_\_

TOTAL ENCLOSED \$ \_\_\_\_\_

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