

5th 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 8th 2013

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 is one good investment idea worth?

The 5th annual Make A Difference – Wisconsin Investment Conference is the must-attend event in the Midwest for investment and finance professionals, as well as individual investors. Modeled after and value-priced compared to the renowned Ira Sohn Investment Research Conference in New York City, this year's expert panel promises to deliver another afternoon of top investment ideas and perspectives.

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



Keynote speaker – Rick Rieder, BlackRock

Rick Rieder, BlackRock Managing Director, headlines this year's Conference. Rick is Chief Investment Officer of Fundamental Fixed Income and co-head of Fixed Income Americas. He is a member of the Federal Reserve Bank of New York's Investment Advisory Committee on Financial Markets and has served as vice chair and member of the Borrowing Committee for the U.S. Treasury. BlackRock, a multinational investment management corporation headquartered in NYC, is the world's largest asset manager with roughly \$3.8 trillion under management as of December 31st. The company has been called "...one of, if not the, most influential financial institutions in the world."

In April, Rick will be inducted into the FIASI (Fixed Income Analysts Society) 2013 Fixed Income Hall of Fame. Before joining BlackRock in 2009, Rick was president and CEO of R3 Capital Partners, a fund he still manages at BlackRock. From 1987 to 2008, he was with Lehman Bros, most recently as head of the firm's Global Principal Strategies team. Among his many community activities, Rick is on the Board of Trustees of Emory University and the US Olympic Foundation.



Dafydd Lewis, CFA Investment Analyst, Frontier Markets, Lloyd George Management, a part of BMO Global Asset Management

In 2011, Dafydd joined the Frontier Markets (Europe) team at Lloyd George Management (LGM), Limited, which has surpassed \$250 million in assets under management for its Frontier Markets equity strategy – countries with market-oriented economies in the early stages of economic development. Dafydd began his career in HSBC's emerging market equity strategy team in 2005 and relocated to Dubai at the beginning of 2007 to cover Middle Eastern equity markets. In 2008, he joined GAM's emerging market team in Dubai as an investment analyst with a primary focus on global frontier markets.



Charles A. "Chip" Paquelet, CFA Founder & Portfolio Manager, Skylands Capital

Founded in 2004, Skylands Capital is a financial investment advisory firm headquartered in Milwaukee with approximately \$750 million of assets under management. Prior to founding Skylands Capital, Chip was a principal at Strong Capital Management, which he joined in 1989. During his tenure at Strong, he served as portfolio manager of two private investment partnerships, an offshore hedge fund, four mutual funds and numerous separate accounts. Prior to joining Strong, Chip worked as a financial analyst for B.F. Goodrich & Co.



Haruki Toyama Co-Founder & President, Marcus Asset Management Based in Milwaukee, Marcus Asset Management is the Managing Member of 103 Watson Fund, a long/short investment partnership

that invests in publicly traded equities with the objective of beating the S&P 500 index without taking undue risk. Haruki serves as the Portfolio Manager for 103 Watson Fund, and also oversees the securities portfolio for Marcus Investments, the investment arm of the Marcus family. He has two decades of professional investment experience, including service as portfolio manager and analyst at MFS Investment Management, David L. Babson & Company, Madison Investment Advisors, and Toyama Capital Management.

Register on back or online at <http://makeadifferencewisconsin.org> \$250 by April 22 | \$300 after April 22 | \$500 at the door subject to availability | \$100 Make A Difference volunteers

Premier Sponsor



Presenting Sponsor



Networking Event Sponsor



Register today for the May 8th Investment Conference



Make A Difference – Wisconsin is a non-profit 501(c)3 organization dedicated to providing Wisconsin 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 Wisconsin high school students. Your support provides financial education at a critical time of economic challenges and impacts 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.

To register, complete the form below online at www.makeadifferencewisconsin.org. 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

_____ Community Sponsor x \$1000 = \$ _____
(includes 2 seats and special promotional benefits)

Please provide company or sponsor here:

Please list attendees:

1. _____
2. _____

_____ Table Sponsor (reserved table of 8) x \$2,500 = \$ _____

Please provide name or company here:

Please list attendees:

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

_____ Early-bird registrations on or before April 22nd x \$250 = \$ _____

_____ Registrations after April 22nd x \$300 = \$ _____

_____ 2012–2013 Make A Difference volunteer instructor x \$100 = \$ _____

Registrations at the door: \$500 subject to availability

TOTAL ENCLOSED \$ _____

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