

7th Annual

Investment Conference

ALL PROCEEDS benefit financial literacy education for area youth



Make A Difference
Wisconsin

Money Smart. Life Smart.

Wednesday, May 13, 2015

1:30 – 2:30 pm Registration | 2:30 – 5:00 pm Program | 5:00 pm Networking Reception
Hyatt Regency | 333 West Kilbourn Avenue | Milwaukee

What investment insights will inform your decisions in 2015?

Get actionable ideas and capitalize on valuable commentary from some of today's brightest investment professionals. The speaker line-up for the 7th annual Make A Difference – Wisconsin Investment Conference promises another terrific afternoon of compelling investment ideas and perspectives for you, for your investment teams...or as a unique experience for your valued clients! **Register early! We anticipate another sold-out event.**



Keynote speaker – Howard Marks, CFA, CIC Chairman Oaktree Capital Management

Renowned for his insightful assessments of market opportunity and risk, Howard Marks is frequently sought out by the world's leading value investors. His concepts of "second-level thinking," the price/value relationship, patient opportunism, and defensive investing have brought Howard a large following that includes Warren Buffet, one of the best investors of our time.

Since the formation of Oaktree in 1995, Howard has been responsible for ensuring the firm's adherence to its core investment philosophy and contributing his experience to big-picture investment decisions. Howard received the George Hay Brown Prize from the Booth School of Business of the University of Chicago. He is a CFA® charterholder and a Chartered Investment Counselor. Mr. Marks serves on the Investment Committee of the Helmsley Charitable Trust, the Board of Trustees of Mount Sinai Hospital, and the Board of the University of Pennsylvania.



Ann M. Miletti Managing Director Wells Capital Management

As a managing director and senior portfolio manager on the PMV Equity team at Wells Capital Management, Ann is lead portfolio manager for the PMV Small Cap, PMV SMID Cap, and PMV All Cap equity strategies. Ann began her career in 1991, joining Wells Capital Management in 2005 from Strong Capital Management where she served in a similar role. She began her career at Strong as an investor services representative and later as an equity research analyst. Ann is a frequent guest on CNBC's *Closing Bell* and participated in USA Today's *Investment Roundtable* in 2011 and 2012.



Ernesto Ramos, PhD Portfolio Manager/Head of Equities, BMO Global Asset Management

As head of Equities and a Portfolio Manager, Ernesto, who joined BMO Global Asset Management in 2005, leads the team responsible for portfolio management and research for all equity strategies. He began his investment management career in 1992 with Battery-march Financial Management. He then was Partner and Lead Portfolio Manager at Nicholas-Applegate Capital Management LLC, and Software Developer at Bolt, Beranek, and Newman. Ernesto's career features investment management and research, econometric research, statistical research, and computer graphics research.



John Thompson Chief Executive Officer Vilas Capital Management

John founded Vilas Capital Management in 2010. Prior to this, he was founder, President and Chief Investment Officer for Mortgage Assurance Corporation (now NMI Holdings, Inc.). From 1993-2009, John was Vice President and Chief Investment Officer for Thompson Investment Management, Inc. He was an officer of the Thompson Plumb Funds, Inc. from 1995-2009, and President and COO from 2004-2009. He served as lead portfolio manager of the Thompson Plumb Growth fund from 1996-2009 and the Thompson Plumb Bond Fund from 1999-2009. John is also a CFA charterholder.

Register on back or at www.makeadifferenceconference.com \$300 by April 29 | \$350 after April 29 | \$500 at the door subject to availability | \$150 Make A Difference volunteers

Premier Sponsor



Networking Event Sponsor



www.makeadifferenceconference.com

Register today for the May 13th 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 enables Make A Difference – Wisconsin to mobilize a volunteer force of over 600 who provide financial education and coaching to thousands of Wisconsin teens. Your support provides financial education at a critical stage of life 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, visit www.makeadifferenceconference.com or print this form and mail with your check payable to Make A Difference – Wisconsin, 710 N. Plankinton Ave., Suite 310, Milwaukee, WI 53203.

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_____ Registrations after April 29 x \$350 = \$ _____

_____ 2014-2015 Make A Difference volunteer instructor x \$150 = \$ _____

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Registrations at the door: \$500 subject to availability