



5TH ANNUAL

# Wealth and Asset Management Research Conference

THURSDAY, MAY 6 (all times are CT)

12:00 p.m.	A Career in the Study of Finance	<b>Robert Merton, PhD</b> <i>Distinguished Professor of Finance, MIT Sloan School of Management and Resident Scientist, Dimensional Fund Advisors</i>
		<b>MODERATOR:</b> <b>Aaron Alley, CFP</b> <i>Vice President, Dimensional Fund Advisors</i>
1:00 p.m.	The Evolving Role of Exchange Traded Funds	<b>Josh Rogers</b> <i>Executive Director, Senior Investment Strategist, J.P. Morgan Asset Management</i>
		<b>Althea Trevor, CFA</b> <i>Head of Equity Portfolio Strategists, Dimensional Fund Advisors</i>
		<b>Tim Coyne</b> <i>Global Head of Exchange Traded Funds, T. Rowe Price</i>
		<b>MODERATOR:</b> <b>Kaisa Stucke, CFA</b> <i>Equity Analyst, Confluence Investment Management</i>
2:00 p.m.	The Future of Wealth Management—A Conversation with Jim Hays	<b>Jim Hays</b> <i>Head of Wells Fargo Advisors and Wealth and Investment Management Client Group, Wells Fargo Advisors</i>
		<b>MODERATOR:</b> <b>Richard Ryffel</b> <i>Professor of Finance Practice, WashU Olin Business School</i>
3:15 p.m.	The Collision of Technology, Culture and Finance—GameStop and Beyond	<b>Ron Kruszewski</b> <i>CEO, Stifel</i>
		<b>MODERATOR:</b> <b>Peter Boumgarden, PhD</b> <i>Koch Professor of Practice for Family Enterprise, WashU Olin Business School</i>
4:15 p.m.	Marriage and Mortality	<b>Robert A. Pollak, PhD</b> <i>Hernreich Distinguished Professor of Economics, Faculty of Arts and Sciences and WashU Olin Business School</i>

FRIDAY, MAY 7 (all times are CT)

8:00 a.m.	Did Mutual Fund Return Persistence Persist?	<b>James Choi, PhD</b> <i>Professor of Finance, Yale University School of Management</i>
9:00 a.m.	Why Add Bitcoin to a Portfolio Today?	<b>Christine Sandler</b> <i>Head of Digital Assets Sales and Marketing, Fidelity Digital Assets</i>
		<b>David Andolfatto, PhD</b> <i>Senior Vice President, St. Louis Federal Reserve Bank</i>
		<b>Perianne Boring</b> <i>Founder and President, Chamber of Digital Commerce</i>
		<b>MODERATOR:</b> <b>Brian Estes</b> <i>Chief Investment Officer, Off the Chain Capital</i>
10:15 a.m.	Direct vs. Indirect Federal Bond Subsidies: New Evidence on Cost of Capital	<b>Marty Luby</b> <i>Assistant Dean for Academic Strategies and Associate Professor, LBJ School of Public Affairs at the University of Texas at Austin</i>
11:15 a.m.	Factor Investing in Corporate Bonds	<b>Lacey Huebel</b> <i>Vice President &amp; Portfolio Manager, Fixed Income, Dimensional Fund Advisors</i>
		<b>MODERATOR:</b> <b>Courtney Scott</b> <i>Regional Director, Dimensional Fund Advisors</i>
12:00 p.m.	Enlightened Hospitality in the Capital Markets	<b>Danny Meyer</b> <i>CEO and Founder, Union Square Hospitality Group</i>
		<b>MODERATOR:</b> <b>Peter Boumgarden, PhD</b> <i>Koch Professor of Practice for Family Enterprise, WashU Olin Business School</i>