







## Investment advisor event



## CLIENT AGENDA AND SPEAKERS Sunday, March 23, 2025

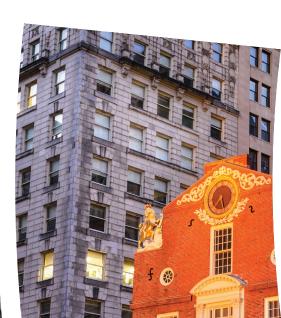
Time	Agenda
6:00 p.m9:00 p.m.	Welcome dinner
	Grill 23 & Bar
	161 Berkeley Street
	Boston, MA 02116

## Monday, March 24, 2025

Time	Agenda	
8:30 a.m.–9:00 a.m.	Registration and light breakfast Fidelity Office 245 Summer Street Boston, MA 02210	
9:00 a.m.–9:30 a.m.	The rise of digital assets: Opportunities for investors  Max Wadington, Research Analyst  Matt Hogan, Research Analyst	
9:30 a.m.–10:00 a.m.	Sector watch: Market trends that matter  Denise Chisholm, Director of Quantitative Market Strategy	
10:00 a.m.–10:30 a.m.	Alternative investment insights  Harley Lank, Head of High Income and Alternatives/Portfolio Manager	
10:30 a.m.–10:40 a.m.	Break	
10:40 a.m.–11:10 a.m.	Monetizing volatility: Unlocking yield in equity investing Eric Granat, Portfolio Manager and Derivatives Analyst	
11:10 a.m.–11:45 a.m.	Harnessing the power of data  Neil Constable, Head of Quantitative Research and Investments	
11:45 a.m.–12:45 p.m.	Lunch	









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Time	Agenda	
12:50 p.m2:00 p.m.	Chart Room/FCAT tours (30 minutes each)	
2:15 p.m.–2:45 p.m.	Seizing opportunities: A concentrated approach to U.S. growth Stephen DuFour, Portfolio Manager	
2:45 p.m3:00 p.m.	Break	
3:00 p.m.–3:30 p.m.	ETF insights: An all-in-one approach to portfolio construction Étienne Joncas-Bouchard, Director, ETF & Alternatives Strategy	
3:30 p.m3:40 p.m.	Closing remarks	