



Investment advisor event

CLIENT AGENDA AND SPEAKERS

Sunday, March 23, 2025

Time	Agenda
6:00 p.m.–9:00 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.m.–2:00 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.m.–3:00 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.m.–3:40 p.m.	Closing remarks