

## AGENDA | Scottsdale

### The Phoenician Resort

6000 East Camelback Road | Scottsdale, AZ

**General sessions:** Phoenician Grand Ballroom

### Conference Day 1

Thursday, November 21, 2024

7:15 a.m. – 8:20 a.m. MT	<b>Conference registration and breakfast (in-person attendees)</b> <i>Advisors must first register and obtain their conference name badge before attending breakfast.</i> <i>Registration desk is located at the <b>Phoenician Grand Ballroom Foyer</b>.</i>
8:20 a.m. – 8:30 a.m. MT	<b>Welcome remarks</b> David Bushnell, <i>Senior Vice President, Advisor National Sales</i>
8:30 a.m. – 9:15 a.m. MT	<b>Global asset allocation outlook</b> <b>SPEAKERS:</b> David Wolf, <i>Portfolio Manager</i> David Tulk, <i>Portfolio Manager</i> Ilan Kolet, <i>Institutional Portfolio Manager</i>
9:15 a.m. – 9:55 a.m. MT	<b>Unlocking higher yields in equity investing</b> <b>SPEAKERS:</b> Andrei Bruno, <i>Director, ETFs</i> Brendan Sims, <i>Alternative Strategist</i>
9:55 a.m. – 10:10 a.m. MT	<b>Break</b>
10:10 a.m. – 10:50 a.m. MT	<b>Dividend investing and downside protection</b> <b>SPEAKER:</b> Ramona Persaud, <i>Portfolio Manager</i>

**Thursday, November 21, 2024 (continued)**

10:50 a.m. – 11:30 a.m. MT	<p><b>Investing with a high-quality framework</b>  <b>SPEAKER:</b> Darren Lekkerkerker, <i>Portfolio Manager</i></p>
11:30 a.m. – 11:40 a.m. MT	<b>Break</b>
11:40 a.m. – 12:20 p.m. MT	<p><b>Quantifying tomorrow: The future of data-driven investing</b>  <b>SPEAKER:</b> Neil Constable, <i>Head of Quantitative Research and Investments</i></p>
12:20 p.m. – 1:20 p.m. MT	<b>Lunch for advisors</b>
1:20 p.m. – 2:00 p.m. MT	<p><b>An alternative perspective</b>  <b>SPEAKER:</b> Dave Way, <i>Portfolio Manager</i></p>
2:00 p.m. – 2:45 p.m. MT	<p><b>A tactical approach to income investing</b>  <b>SPEAKERS:</b> Adam Kramer, <i>Portfolio Manager</i>          Scott Mensi, <i>Institutional Portfolio Manager</i></p>
2:45 p.m. – 2:55 p.m. MT	<b>Break</b>
2:55 p.m. – 3:25 p.m. MT	<p><b>Regulatory update</b>  <b>SPEAKER:</b> Andrea Rigobon, <i>Director, Procurement, Senior Legal Counsel and Chief Privacy Officer</i></p>
3:25 p.m. – 3:40 p.m. MT	<p><b>Day 1 closing remarks</b>          Alex Gabriini, <i>Vice President, Regional Sales</i></p>
3:40 p.m. – 6:30 p.m. MT	<b>Free Time</b>
6:30 p.m. – 9:00 p.m. MT	<p><b>Dinner arranged by your Fidelity representative.</b>          Details to follow</p>
9:00 p.m. MT	<p><b>Optional socializing</b>          Contact your Fidelity Sales representative.</p>

## Conference Day 2

### Friday, November 22, 2024

7:30 a.m. – 8:30 a.m. MT	<b>Breakfast for advisors</b>
8:30 a.m. – 8:40 a.m. MT	<b>Day 2 opening remarks</b> David Bushnell, <i>Senior Vice President, Advisor National Sales</i>
8:40 a.m. – 9:20 a.m. MT	<b>The power of U.S. growth opportunities</b> <b>SPEAKER:</b> Becky Baker, <i>Portfolio Manager</i>
9:20 a.m. – 10:00 a.m. MT	<b>The power and potential of contrarian investing</b> <b>SPEAKER:</b> Hugo Lavallée, <i>Portfolio Manager</i>
10:00 a.m. – 10:10 a.m. MT	<b>Break</b>
10:10 a.m. – 10:50 a.m. MT	<b>Turning volatility into opportunity</b> <b>SPEAKER:</b> Dan Dupont, <i>Portfolio Manager</i>
10:50 a.m. – 11:00 a.m. MT	<b>Break</b>
11:00 a.m. – 11:45 a.m. MT	<b>Taking advantage of positive change</b> <b>SPEAKER:</b> Mark Schmehl, <i>Portfolio Manager</i>
11:45 a.m. – 12:00 p.m. MT	<b>Break</b>
12:00 p.m. – 12:45 p.m. MT	<b>State of the market</b> <b>SPEAKER:</b> Jurrien Timmer, <i>Director, Global Macro</i>
12:45 p.m. – 1:00 p.m. MT	<b>Summary and conference close</b> Alex Gabrini, <i>Vice President, Regional Sales</i>
1:00 p.m. – 2:00 p.m. MT	<b>Lunch for advisors</b>
2:00 p.m. – 6:30 p.m. MT	<b>Free time</b>
6:30 p.m. – 9:30 p.m. MT	<b>Closing conference reception for advisors</b> Phoenician Patio and East Lawn, The Phoenician Resort
9:30 p.m. MT	<b>Optional socializing</b> Contact your Fidelity Sales representative.