

Financial Literacy Day & Laboratory Dedication

March 30, 2017

University of South Florida
USF Sarasota-Manatee at the Selby Auditorium
8350 North Tamiami Trail, Sarasota, FL 34243

For Registration visit: usfsm.edu/FinancialLiteracy

AGENDA

8:30 am Registration and Admission for Financial Literacy Day

9:00 am Welcoming Remarks

- [Dr. Terry A. Osborn](#)
Interim Regional Chancellor, USF Sarasota-Manatee

Emcee

- [David R. Kotok](#)
Chairman and Chief Investment Officer, Cumberland Advisors
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9:15 am Session I Fiduciary and Trustee Roles and Responsibilities

Pension Plans - Trustee Role

- [David Berson, Ph.D.](#)
Senior Vice President and Chief Economist, Nationwide Mutual

401(k) and 403(b) New Department of Labor Fiduciary Rules: Role of Consultants in Reviewing Investment for Foundations, Trusts, and Retirement Plans

- [Michael McNiven, Ph.D.](#)
Managing Director and Portfolio Manager, Cumberland Advisors

Fiduciary Roles and Philanthropy

- [David R. Fink, CFA, CFP](#)
Regional Vice President, Halliday Financial, Sarasota, FL

Legal Considerations Affecting the Conduct and Disclosures of Trustees and Fiduciaries

- [Neal D. Colton, JD, MBA, CFP](#)
Former Shareholder (retired), Cozen O'Connor, Philadelphia, PA

Moderator

- [Judy Hangartner, CPA](#)
Assistant Professor, State College of Florida
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10:30 am Break

10:45 am Session II Women’s Financial Issues

Real Estate: Women’s Skills and Knowledge Applied to Real Estate

- [Cheryl Loeffler](#)
Realtor and Former Chairman Board of Trustees, Ringling College

The Financial Planning Landscape in the Context of Women’s Issues

- [Laura Mattia Ph.D., CFP®](#)
Financial Planning Program Director, Cumberland Advisors and the University of South Florida

Earning an Income: Employment Law Issues for Women

- [Kimberly Walker](#)
Attorney, Williams Parker Harrison Dietz & Getzen

Education and Financial Literacy for Younger Women

- [Tracy Collins, Ph.D.](#)
Assistant Professor of Economics, New College of Florida

Moderator

- [Alison M. Gardner](#)
First Vice President- Wealth Management & Senior Portfolio Manager, Morgan Stanley
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12:00 pm Lunch

1:00 pm Session III Atlanta Federal Reserve Bank’s Financial Literacy/Education Program

- [Michael Chriszt](#)
Vice President & Public Affairs Officer, Federal Reserve Bank of Atlanta
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1:45 pm Session IV Investment Options and Outlook for Investors and Financial Markets

US Stock Market

- [Edward F. Keon, Jr.](#)
Managing Director and Portfolio Manager, Quantitative Management Associates

US Bond Market

- [John Mousseau, CFA](#)
Executive Vice President and Director of Fixed Income, Cumberland Advisors

Alternative Investments and Options (materials, hedge funds, hard assets, land, timber, etc.)

- [Ray Dillon](#)
President & CEO (retired), Deltic Timber Corporation

Moderator

- [Janet Sperling](#)
Senior Vice President, Investments, WMS, Raymond James, Sarasota, FL
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2:30 pm Break

3:00 pm Session V Global Economic Outlook: Where Do We Go From Here?

China Outlook

- [Michael Drury](#)
Chief Economist, McVean Trading & Investments, and Chairman, Global Interdependence Center

Japan Outlook

- [Kozo Koide](#)
Chief Economist Asset Management One Co., Ltd., Tokyo, Japan

Europe & Brexit Outlook

- [Megan Greene](#)
Managing Director and Chief Economist , Manulife Asset Management Limited

South America & Argentina Outlook

- [Ramiro Lopez Larroy](#)
Partner and Director, Integras Capital, Buenos Aires, Argentina

Moderator

- [Michael McKee](#)
Worldwide Bloomberg TV & Radio Journalist
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4:30 pm Keynote Remarks

Introduction of Keynote Speaker: A New College Graduate

- [Dr. Donal O'Shea](#)
President and Professor of Mathematics - Natural Sciences, New College of Florida

Keynote Remarks

- [William C. Dudley, Ph.D.](#)
President & CEO, Federal Reserve Bank of New York
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5:30 pm Closing Remarks

- [David R. Kotok](#)
Chairman and Chief Investment Officer, Cumberland Advisors
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6:15 pm Reception

Dedication of Bloomberg Terminal Laboratory