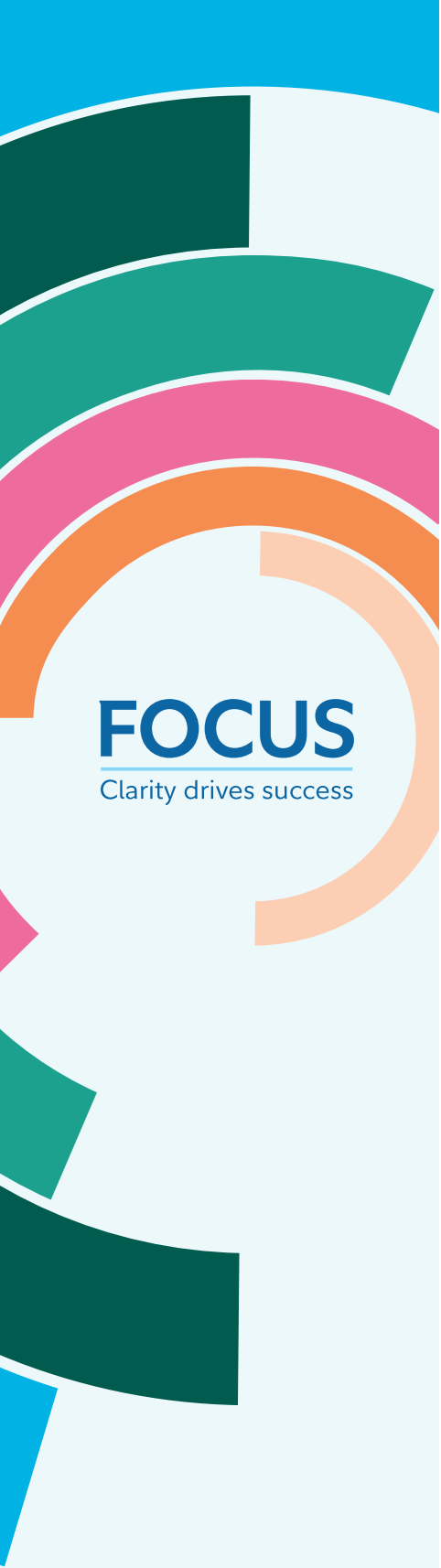




FOCUS

Clarity drives success

VIRTUAL AGENDA

FOCUS Day 1 – Thursday, October 16, 2025

8:00 a.m. ET	WELCOME TO OUR VIRTUAL ATTENDEES
8:20 a.m. ET	Welcome remarks David Bushnell, <i>Senior Vice President, Advisor National Sales</i>
SEGMENT 1	
8:30 a.m. ET	Concentrated investing in U.S. equities Stephen DuFour, <i>Portfolio Manager</i>
9:00 a.m. ET	Asset allocation update: A global perspective David Wolf, <i>Portfolio Manager</i> David Tulk, <i>Portfolio Manager</i> Ilan Kolet, <i>Institutional Portfolio Manager</i>
9:40 a.m. ET	EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW.
SEGMENT 2	
9:50 a.m. ET	The industrial revolution (finally) comes to investing Neil Constable, <i>Head of Quantitative Research and Investments</i>
10:20 a.m. ET	The power of dividend investing Ramona Persaud, <i>Portfolio Manager</i>
10:50 a.m. ET	EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW.
SEGMENT 3	
11:00 a.m. ET	Harnessing quality across global markets Patrice Quirion, <i>Portfolio Manager</i>
11:30 a.m. ET	State of the market Jurrien Timmer, <i>Director, Global Macro</i>
12:10 p.m. ET	EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW.
SEGMENT 4	
1:10 p.m. ET	Lessons learned Will Danoff, <i>Portfolio Manager</i> Nidhi Gupta, <i>Portfolio Manager</i> Matthew Drukker, <i>Portfolio Manager</i> Michael Hickey, <i>Institutional Portfolio Manager</i>
1:50 p.m. ET	The next wave of growth: Where innovation meets opportunity Mark Schmehl, <i>Portfolio Manager</i>
2:30 p.m. ET	EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW.
SEGMENT 5	
2:40 p.m. ET	Income in action Adam Kramer, <i>Portfolio Manager</i> Scott Mensi, <i>Institutional Portfolio Manager</i>
3:15 p.m. ET	Regulatory update Andrea Rigobon, <i>Director, Procurement and Senior Legal Counsel, Chief Privacy Officer</i>
3:45 p.m. ET	Day 1 closing remarks Alex Gabrini, <i>Vice President, Regional Sales</i>
4:00 p.m. ET	VIRTUAL CLOSE

VIRTUAL AGENDA

FOCUS Day 2 – Friday, October 17, 2025

8:00 a.m. ET WELCOME TO VIRTUAL ATTENDEES

8:30 a.m. ET Day 2 opening remarks
David Bushnell, *Senior Vice President, Advisor National Sales*

SEGMENT 6

8:40 a.m. ET ETF insights: An All-In-One approach to portfolio construction
Étienne Joncas-Bouchard, *Director, ETF and Alternatives Strategy*

9:20 a.m. ET Sector watch: Market trends
Denise Chisholm, *Director of Quantitative Market Strategy*

10:00 a.m. ET EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW.

SEGMENT 7

10:10 a.m. ET Uncovering hidden gems: Intrinsic value investing
Morgen Peck, *Portfolio Manager*
Sam Chamovitz, *Portfolio Manager*
Naveed Rahman, *Institutional Portfolio Manager*

10:50 a.m. ET Staying resilient in turbulent markets
Daniel Dupont, *Portfolio Manager*

11:30 a.m. ET EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW

SEGMENT 8

11:40 a.m. ET Navigating the world of fixed income
Michael Plage, *Portfolio Manager*

12:10 p.m. ET Investing against the grain
Hugo Lavallée, *Portfolio Manager*

12:50 p.m. ET Summary and conference close
Alex Gabrini, *Vice President, Regional Sales*

1:05 p.m. ET VIRTUAL CLOSE

FOCUS
Clarity drives success