

FOCUS2022

SEE WHAT WE SEE

Orlando in-person and virtual event

CLIENT AGENDA (AGENDA IS SUBJECT TO CHANGE) (as of October 21, 2022)

Thursday, December 8, 2022

Time	Agenda
7:15 a.m.–8:30 a.m. ET	Conference registration and breakfast (in-person attendees) <i>JW Marriott Orlando, Grande Lakes, Mediterranean Salons 123 4040 Central Florida Parkway Orlando, FL</i> Advisors must first register and obtain their conference name tag before attending breakfast. Registration desk is located at Mediterranean Salons 123 JW Marriott Orlando Grande Lakes
Sessions	<i>Palazzo Ballroom, JW Marriott Orlando, Grande Lakes</i>
8:30 a.m.–8:40 a.m. ET	Welcome remarks David Bushnell, Senior Vice President, Advisor National Sales
Segment 1	
8:40 a.m.–9:25 a.m. ET	Asset allocation highlights: A global perspective David Wolf, Portfolio Manager David Tulk, Portfolio Manager Ilan Kolet, Institutional Portfolio Manager Moderator: Pat Bolland
9:25 a.m.–9:35 a.m. ET	Break

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Thursday, December 8, 2022 (continued)

Time	Agenda
9:35 a.m.–10:10 a.m. ET	Paying dividends with active management Don Newman, Portfolio Manager Moderator: Pat Bolland
10:10 a.m.–10:20 a.m. ET	Break
Segment 2	
10:20 a.m.–11:00 a.m. ET	The upside to downside protection Steve MacMillan, Portfolio Manager Moderator: Pat Bolland
11:00 a.m.–11:20 a.m. ET	Fidelity Tax-Smart Solutions™: Maximize efficiency. Increase potential. Michelle Munro, Director, Tax and Retirement Research Peter Bowen, Vice President, Tax and Retirement Research
11:20 a.m.–11:30 a.m. ET	Break
11:30 a.m.–12:10 p.m. ET	Fixed income investing in an evolving world Jeff Moore, Portfolio Manager Michael Plage, Portfolio Manager Moderator: Pat Bolland
12:10 p.m.–1:10 p.m. ET	Extended break Lunch break (in-person attendees) <i>Mediterranean Salons 123</i>

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Thursday, December 8, 2022 (continued)

Time	Agenda
Segment 3	
1:10 p.m.–1:55 p.m. ET	Navigating through the new normal: An alternative perspective David Way, Portfolio Manager Brett Dley, Portfolio Manager Moderator: Rory Poole, Alternative Strategist
1:55 p.m.–2:05 p.m. ET	Break
2:05 p.m.–2:50 p.m. ET	Identifying opportunities in volatile periods Dan Dupont, Portfolio Manager Moderator: Pat Bolland
2:50 p.m.–3:00 p.m. ET	Break
3:00 p.m.–3:45 p.m. ET	Contrarian perspectives Hugo Lavallée, Portfolio Manager Moderator: Pat Bolland
3:45 p.m.–4:00 p.m. ET	Day one closing remarks David Bushnell, Senior Vice President, Advisor National Sales <i>Palazzo Ballroom, JW Marriott Orlando, Grande Lakes</i>
4:00 p.m.–6:30 p.m. ET	Free time
6:30 p.m.–9:00 p.m. ET	Dine around for advisors (in-person attendees)
9:00 p.m. ET	Optional socializing; contact your Fidelity Sales representative (in-person attendees)

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Friday, December 9, 2022

Time	Agenda
7:30 a.m.–8:30 a.m. ET	Breakfast for advisors (in-person attendees) <i>Mediterranean Salons 123</i>
Sessions	Palazzo Ballroom, JW Marriott Orlando, Grande Lakes
8:30 a.m.–8:40 a.m. ET	Day two opening remarks David Bushnell, Senior Vice President, Advisor National Sales
Segment 4	
8:40 a.m. –9:25 a.m. ET	Discover a world of opportunities with ETFs Vivian Hsu, Director, Product Innovation Meghan Chen, Digital Assets Strategist Reetu Kumra, Analyst and Portfolio Manager Moderator: Pat Bolland
9:25 a.m.–9:35 a.m. ET	Break
9:35 a.m.–10:20 a.m. ET	Intrinsic value investing for long-term capital growth Morgen Peck, Portfolio Manager Sam Chamovitz, Portfolio Manager Salim Hart, Portfolio Manager Moderator: Pat Bolland
10:20 a.m.–10:30 a.m. ET	Break

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Friday, December 9, 2022 (continued)

Time	Agenda
Segment 5	
10:30 a.m.–11:15 a.m. ET	Opportunities in small cap investing Connor Gordon, Portfolio Manager Chris Maludzinski, Portfolio Manager Moderator: Pat Bolland
11:15 a.m.–11:40 a.m. ET	Canadian regulatory landscape Sian Burgess, Senior Vice President, Fund Oversight
11:40 a.m.–11:55 a.m. ET	Break
11:55 a.m.–12:50 p.m. ET	State of the Markets Jurrien Timmer, Director, Global Macro
12:50 p.m.–1:00 p.m. ET	Summary and conference close David Bushnell, Senior Vice President, Advisor National Sales <i>Palazzo Ballroom, JW Marriott Orlando, Grande Lakes</i>
1:00 p.m.–2:00 p.m. ET	Lunch for advisors (in-person attendees) <i>Mediterranean Salons 123</i>
2:00 p.m.–6:30 p.m. ET	Free Time
6:30 p.m.–9:30 p.m. ET	Closing conference reception (in-person attendees) <i>Valencia Patio, JW Marriott Orlando, Grande Lakes</i>
9:30 p.m. ET	Optional socializing; contact your Fidelity sales representative (in-person attendees)