

The Breakers Palm Beach

One South County Road | Palm Beach, FL

General sessions: Ponce de Leon Ballroom

CONFERENCE DAY 1

Thursday, October 12, 2023

7:15 a.m. – 8:20 a.m.

Conference registration and breakfast for advisors

Advisors must first register and obtain their conference name badge before attending breakfast.

Registration table located in the South Foyer of the **Venetian Ballroom**.

8:20 a.m. – 8:30 a.m.

Welcome remarks

David Bushnell, *Senior Vice President, Advisor National Sales*

8:30 a.m. – 9:10 a.m.

A tactical approach to income investing

SPEAKERS: Adam Kramer, *Portfolio Manager*
Scott Mensi, *Portfolio Manager*

MODERATOR: Pat Bolland

9:10 a.m. – 9:50 a.m.

An alternative perspective

SPEAKERS: Brett Dley, *Portfolio Manager*
David Way, *Portfolio Manager*

MODERATOR: Rory Poole

9:50 a.m. – 10:05 a.m.

Break

10:05 a.m. – 10:45 a.m.

Paying dividends with active management

SPEAKER: Don Newman, *Portfolio Manager*

MODERATOR: Pat Bolland

CONFERENCE DAY 1 *(continued)*

Thursday, October 12, 2023

10:45 a.m. – 11:25 a.m.



Global asset allocation outlook

SPEAKERS: David Wolf, *Portfolio Manager*
David Tulk, *Portfolio Manager*
Ilan Kolet, *Institutional Portfolio Manager*

MODERATOR: Kathryn Black

11:25 a.m. – 12:10 p.m.



Fixed income now

SPEAKERS: Jeff Moore, *Portfolio Manager*
Stacie Ware, *Quantitative Analyst*

MODERATOR: Pat Bolland

12:10 p.m. – 1:10 p.m.



Lunch

1:10 p.m. – 1:55 p.m.



CIO insights: The evolving market landscape

SPEAKER: Andrew Marchese, *Chief Investment Officer and Portfolio Manager*

1:55 p.m. – 2:35 p.m.



Fidelity's research: A competitive advantage

SPEAKER: Reetu Kumra, *Director of Research and Portfolio Manager*

MODERATOR: Kathryn Black

2:35 p.m. – 2:50 p.m.



Break

2:50 p.m. – 3:30 p.m.







Turning volatility into opportunity

SPEAKER: Dan Dupont, *Portfolio Manager*

MODERATOR: Pat Bolland

CONFERENCE DAY 1 *(continued)*

Thursday, October 12, 2023

3:30 p.m. – 3:45 p.m.		Day 1 closing remarks David Bushnell, <i>Senior Vice President, Advisor National Sales</i>
3:45 p.m. – 6:30 p.m.		Free time
6:30 p.m. – 9:00 p.m.		Dine-around for advisors Refer to name badge for dine-around location.
9:00 p.m.		Optional socializing Contact your Fidelity Sales representative.

CONFERENCE DAY 2

Friday, October 13, 2023

7:30 a.m. – 8:30 a.m.

Breakfast

8:30 a.m. – 8:40 a.m.



Day 2 opening remarks

David Bushnell, *Senior Vice President, Advisor National Sales*

8:40 a.m. – 9:25 a.m.



What's in store for emerging markets?

SPEAKER: Sam Polyak, *Portfolio Manager*

MODERATOR: Kathryn Black

9:25 a.m. – 9:35 a.m.

Break

9:35 a.m. – 10:20 a.m.



Uncovering hidden gems: Intrinsic value investing

SPEAKERS: Morgen Peck, *Portfolio Manager*
Sam Chamovitz, *Portfolio Manager*
Salim Hart, *Portfolio Manager*

MODERATOR: Pat Bolland

10:20 a.m. – 10:30 a.m.

Break

10:30 a.m. – 11:15 a.m.



The power and potential of contrarian investing

SPEAKER: Hugo Lavallée, *Portfolio Manager*

MODERATOR: Kathryn Black

11:15 a.m. – 11:40 a.m.



Regulatory update

SPEAKER: Sian Burgess, *Senior Vice President, Fund Oversight*

CONFERENCE DAY 2 *(continued)*

Friday, October 13, 2023

11:40 a.m. – 11:55 a.m.		Break
11:55 a.m. – 12:50 p.m.		The global macro view SPEAKER: <i>Jurrien Timmer, Director, Global Macro</i>
12:50 p.m. – 1:00 p.m.		Summary and conference close <i>David Bushnell, Senior Vice President, Advisor National Sales</i>
1:00 p.m. – 2:00 p.m.		Lunch
2:00 p.m. – 6:30 p.m.		Free time
6:30 p.m. – 9:30 p.m.		Closing conference reception <i>(advisor plus one guest)</i> <i>Ocean Lawn, The Breakers Palm Beach</i>
9:30 p.m.		Optional socializing Contact your Fidelity Sales representative.