



5TH ANNUAL

Wealth and Asset Management Research Conference

THURSDAY, MAY 6 (all times are CT)

12:00 p.m.	A Career in the Study of Finance	Robert Merton, PhD <i>Distinguished Professor of Finance, MIT Sloan School of Management and Resident Scientist, Dimensional Fund Advisors</i>
		MODERATOR: Aaron Alley, CFP <i>Vice President, Dimensional Fund Advisors</i>
1:00 p.m.	The Evolving Role of Exchange Traded Funds	Josh Rogers <i>Executive Director, Senior Investment Strategist, J.P. Morgan Asset Management</i>
		Althea Trevor, CFA <i>Head of Equity Portfolio Strategists, Dimensional Fund Advisors</i>
		Tim Coyne <i>Global Head of Exchange Traded Funds, T. Rowe Price</i>
		MODERATOR: Kaisa Stucke, CFA <i>Equity Analyst, Confluence Investment Management</i>
2:00 p.m.	The Future of Wealth Management— A Conversation with Jim Hays	Jim Hays <i>Head of Wells Fargo Advisors and Wealth and Investment Management Client Group, Wells Fargo Advisors</i>
		MODERATOR: Richard Ryffel <i>Professor of Finance Practice, WashU Olin Business School</i>
3:15 p.m.	The Collision of Technology, Culture and Finance—GameStop and Beyond	Ron Kruszewski <i>CEO, Stifel</i>
		MODERATOR: Peter Boumgarden, PhD <i>Koch Professor of Practice for Family Enterprise, WashU Olin Business School</i>
4:15 p.m.	Marriage and Mortality	Robert A. Pollak, PhD <i>Hernreich Distinguished Professor of Economics, Faculty of Arts and Sciences and WashU Olin Business School</i>

FRIDAY, MAY 7 (all times are CT)

8:00 a.m.	Did Mutual Fund Return Persistence Persist?	James Choi, PhD <i>Professor of Finance, Yale University School of Management</i>
9:00 a.m.	Why Add Bitcoin to a Portfolio Today?	Christine Sandler <i>Head of Digital Assets Sales and Marketing, Fidelity Digital Assets</i>
		David Andolfatto, PhD <i>Senior Vice President, St. Louis Federal Reserve Bank</i>
		Perianne Boring <i>Founder and President, Chamber of Digital Commerce</i>
		MODERATOR: Brian Estes <i>Chief Investment Officer, Off the Chain Capital</i>
10:15 a.m.	Direct vs. Indirect Federal Bond Subsidies: New Evidence on Cost of Capital	Marty Luby <i>Assistant Dean for Academic Strategies and Associate Professor, LBJ School of Public Affairs at the University of Texas at Austin</i>
11:15 a.m.	Factor Investing in Corporate Bonds	Lacey Huebel <i>Vice President & Portfolio Manager, Fixed Income, Dimensional Fund Advisors</i>
		MODERATOR: Courtney Scott <i>Regional Director, Dimensional Fund Advisors</i>
12:00 p.m.	Enlightened Hospitality in the Capital Markets	Danny Meyer <i>CEO and Founder, Union Square Hospitality Group</i>
		MODERATOR: Peter Boumgarden, PhD <i>Koch Professor of Practice for Family Enterprise, WashU Olin Business School</i>

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