



6TH ANNUAL

Wealth and Asset Management Research Conference

WEDNESDAY, MAY 25 (all times are CT)

9:15 AM	Conference Kickoff	Todd Milbourn , Vice Dean, Olin Business School
9:30 AM	Keynote Address Five Things I Know About Investing	Ken French, PhD , Professor, Dartmouth College
10:30 AM	Diversity, Equity and Inclusion in Wealth Management	Benjamin Akande, PhD , EVP, Human Resources, Stifel PANEL John W. Rogers Jr. , Chairman, Co-CEO & Chief Investment Officer, Ariel Investments Stacey Winning , Chief Talent Officer, Dimensional MODERATOR Vanessa Okwuraiwe , Principal, Inclusion, Equity and Diversity
11:30 AM	BREAK	
11:45 AM	Fintech in Wealth Management	MODERATOR Atul Kamra , Managing Partner, 630 PANEL Matt Macomber , Senior Vice President - Digital Strategy and Wealth Management, Franklin Templeton H. Adam Holt , CFP, ChFC, CEO and Founder, Asset Map-Holdings Ainslie Simmonds , President, Pershing X
12:45 PM	Efficiently Inefficient Markets for Assets and Asset Management	Nicolae Garleanu, PhD , Author and Professor, Olin Business School DISCUSSANT Charles Stucke , CFA, Professional Investor and Adjunct Instructor, Olin Business School
1:45 PM	BREAK	
2:00 PM	Alzheimer's: Preparing Investors and their Families	MODERATOR John Beuerlein , Retired, General Partner, Edward Jones Dr. Joanne Pike , President, Alzheimer's Association Dr. Nancy Morrow-Howell , Betty Bofinger Brown Distinguished Professor of Social Policy, Brown School at Washington University in St. Louis Eric McDade, DO , Associate Professor of Neurology, Washington University School of Medicine
3:00 PM	Age Wave	Ken Dychtwald , Principal, Age Wave Ken Cella , Interlocutor, Principal, Edward Jones
4:00 PM	Adjourn for the Day	

THURSDAY, MAY 26 (all times are CT)

10:00 AM	Women Leading the Wealth Management Industry	Penny Pennington , Managing Partner, Edward Jones PANEL Mary Erdoes , CEO, J.P. Morgan Asset Management Carol Geremia , President, Distribution, MFS Peter Boumgarden, PhD , Professor, Olin Business School
11:00 AM	The Cross-Section of Municipal Bond Returns	Samuel Y. Wang, PhD , Author, Researcher, Dimensional DISCUSSANT Courtney Lee, MBA (Olin) , Associate Investment Strategist, Dimensional
12:00 PM	BREAK	
12:15 PM	Direct Indexing	Kevin Maeda , Chief Investment Officer of Direct Investing, Natixis Investment Managers PANEL Tom O'Shea, CFA , Research Director for Managed Accounts, Cerulli Associates Kevin Cho , Partner, McKinsey & Company MODERATOR Anne Elliott , Senior Investment Advisory Consultant, Edward Jones
1:15 PM	Investing in Art and NFTs	PANEL Shawn Groves , Chief Operating Officer, Masterworks Nina Del Rio , Vice Chairman, Sotheby's Richard Ryffel , Professor of Finance Practice, Olin Business School
2:00 PM	BREAK	
2:15 PM	Future of Wealth Management	Martin Small , Senior Managing Director, Head of US Wealth Advisory, Blackrock Lena Haas , Partner, Client Strategies Group, Edward Jones
3:00 PM	Conference Concludes	
