



7TH ANNUAL

Wealth and Asset Management  
Research Conference

WEDNESDAY, MAY 3, IN PERSON—EMERSON AUDITORIUM (all times are CT)		
1:00 PM	Opening Remarks and Conference Kickoff	Ed Edwin, Regional Director, Dimensional Fund Advisors
1:15 PM	A Conversation with Cliff Asness	Cliff Asness, Founder and Managing Principal, AQR Capital Management
2:00 PM	Market Update	George Gatch, Chief Executive Officer, J.P. Morgan Asset Management
3:00 PM	BREAK	Mona Mahajan, Senior Investment Strategist, Edward Jones
3:30 PM	Charitable Giving and Community Impact	PANEL Maxine Clark, Chief Inspirator, The Delmar DivINe Dara Eskridge, Executive Director, Invest STL Veronica Coleman, Financial Advisor, Edward Jones Joe Fisher, President & CEO, Ren MODERATOR Richard Ryffel, Professor of Finance Practice, Washington University in St. Louis
4:30 PM	RIA Panel	PANEL Ed Edwin, Regional Director, Dimensional Fund Advisors Al Sears, Vice President, Dimensional Fund Advisors Katherine B. Lintz, CFP, Partner, Managing Member, Shareholder, Matter Family Office Peter Bielan, Founder, Bielan Group
5:30 PM	Adjourn for the Day Networking and Cocktails	
THURSDAY, MAY 4, VIRTUAL—VIA ZOOM (all times are CT)		
8:45 AM	Day 1 Recap and Keynote Speaker Introduction	Ed Edwin, Regional Director, Dimensional Fund Advisors
9:00 AM	Keynote – Conscious Capitalism	Penny Pennington, Managing Partner, Edward Jones
9:30 AM	Wealth Management for the Next Generation	PANEL Doug Wilbur, CEO, Denim Social Jim Hays, Consultant and Retired CEO of Wells Fargo Advisors Tanner Smith, Financial Advisor, Benjamin F. Edwards
10:15 AM	BREAK	
10:30 AM	ESG Panel	PANEL Jessica Huang, BlackRock Emily Chew, Chief Responsibility Officer, Calvert MODERATOR Peter Boumgarden, Ph.D., Professor of Practice, Washington University in St. Louis
11:45 AM	Tales from the Crypto...	PANEL Tom Jessop, President of Digital Assets, Fidelity Brian Estes, Chief Exectuive Officer and Chief Investment Officer, Off the Chain Capital Dr. Jimmie Lenz, D.B.A., Director, Master of Engineering in FinTech, Duke University MODERATOR Brendan Winkler, Managing Director/Digital Assets and Blockchain Lead, EY
1:00 PM	BREAK	
1:30 PM	The Outlook for Monetary Policy	Richard Clarida, MD/Global Economic Advisor (Former Fed Bd Vice Chair), PIMCO Craig Fehr, Principal, Investment Strategist, Edward Jones
2:30 PM	Wealth Management Perspectives	Sol Gindi, CEO, Wells Fargo Advisors Anne Elliott, Senior Investment Advisory Consultant, Edward Jones
3:15 PM	Conference Concludes	