Student Managed Investment Fund Consortium Conference

October 5-6, 2023

Hyatt Regency McCormick Place

INDIANA STATE UNIVERSITY

SCOTT COLLEGE OF BUSINESS

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Welcome

Welcome to the 2023 Student Managed Investment Fund Consortium (SMIFC) Conference!

Founded in 2013, the SMIF Consortium has grown from 18 schools to 135 members today. The program this year is rich and stimulating, and it covers a variety of current topics on Financial Markets and Securities.

This year's conference includes training workshops on the latest platforms and software applications in portfolio management and security analysis, as well as a corporate connection session where students may network and seek internships or employment with participating firms. These include BlackRock, Charles Schwab & Co., Edward Jones, Stifel, and First Trust; organizations like Cboe and Federal Reserve Bank; and professional associations such as the CFA Society of Chicago and CMT Association.

We are pleased to welcome back to the SMIFC Conference **Andrew Opdyke, CFA,** Senior Economist at First Trust; **Matt Moran,** Head of Index Insights at Chicago Board of Options Exchange (Cboe); **Tyler Wood**, Managing Director of CMT Association, and **Tiffany Dolby,** Relationship Manager for Advisor Services at Charles Schwab. We are also excited to add to the list of distinguished speakers two representatives from BlackRock, the world's largest investment firm. Please help us welcome **Oscar D. Pulido, CFA,** Managing Director of Product Strategy, and **Hope Collins**, a member of the BlackRock Models Infrastructure team.

We are also grateful to CFA Society of Chicago for providing a group of prestigious speakers including **Neha Shah**, **CFA**, Associate Director, Federal Reserve Bank of New York (in Chicago); **Grant Podolski, CFA,** CAIA, LGIM America; **Blake Shaffer**, **CFA**, Jones Lang Lasalle, and **Madeline Hume, CFA** Senior Research Analyst at Morningstar. And finally, we thank **Robert A.J. Patton**, CEO and Founder at 548 Enterprise; **Kathy Nguyen**, Director of Product Marketing at Cboe; **Ano Glonti**, CEO and Founder of TradeUpToWallStreet; **Dr. Derek Horstmeyer**, Professor of Finance, George Mason University, and **Nathan Beemster**, VP - Senior Regional Trust Consultant , Charles Schwab Trust Company of Delaware, for agreeing to speak this year.

We hope you enjoy this year's SMIFC conference and that your time here is productive and meaningful. We wish you all the best for a bright future.

Tarek S. Zaher, Ph.D.
Director, SMIFC Conference
Scott College of Business
Indiana State University

Terry Daugherty, Ph.D.
Dean
Scott College of Business
Indiana State University

Who We Are

Student Managed Investment Fund Consortium

The Student Managed Investment Fund Consortium (SMIFC) provides a forum among member institutions to share student managed investment fund best practices in investment management and organization administration. Activities of the consortium emphasize graduate and undergraduate student education, research, and leadership.

Follow us at: SMIFC.org or #SMIFC

About Indiana State University

Indiana State University, established in 1865, is a public university that embraces its mission to educate the leaders of tomorrow with focus on research, experiential learning, and civic engagement. Its five colleges offer courses leading to undergraduate and graduate degrees and certificates in arts and sciences, business, education, health and human services, and engineering and technology.

Scott College of Business

The Scott College of Business is dedicated to providing an internationally accredited professional education to qualified students at both the undergraduate and master's levels. Our primary focus is to prepare students to take leadership roles in both public and private organizations. The College supports, encourages, and produces applied and educational research, development of relationships with the business community, and service to the region and the professions.

In 1980, Indiana State University's business programs first earned accreditation through the Association to Advance Collegiate Schools of Business (AACSB International) and has continued to maintain accreditation for more than 30 years. AACSB International accreditation is the hallmark of excellence in management education. Institutions that earn this accreditation confirm their commitment to quality and continuous improvement through a rigorous and comprehensive peer review. Fewer than 25 percent of U.S. business schools earn this distinction.

INDIANA STATE UNIVERSITY
SCOTT COLLEGE OF BUSINESS

Dr. Tarek Zaher

SMIFC Conference Chair, Professor of Finance, Scott College of Business, Indiana State University

Dr. Tarek Zaher has held a number of professional positions within the industry and provided consulting services to a number of international institutions, including the World Bank, the William Davidson Institute at the University of Michigan, the Academy for Educational Development in the United States, and the Ministry of Work in Dubai. He has also offered a number of seminars in investment and international financial management at institutions around the world.

Dr. Zaher is the supervisor of the Investment Club at Indiana State University. He also manages and supervises other international portfolios for individuals and institutions. Dr. Zaher's research has been published in numerous prestigious professional and scholarly journals, including the *Journal of Financial Research* and *Journal of Banking and Finance*. Dr. Zaher received three research awards and one research certificate of excellence from professional conferences. He was also recognized by the Scott College of Business with the Faculty Research Award in 2002 and with the Exemplary Service Award in 2004.

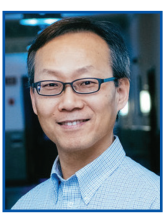
Dr. Terry Daugherty

Dean, Scott College of Business, Indiana State University

Dr. Terry Daugherty is Dean of the Scott College of Business at Indiana State University (ISU) and an expert in digital marketing, consumer psychology, and behavioral research. Having served on the faculty at Vanderbilt University, the University of Texas at Austin, and the University of Akron, Terry has authored more than 70 intellectual contributions while presenting his work at leading academic conferences worldwide. He is the past Editor-in-Chief of the *Journal of Interactive Advertising* for the American Academy of Advertising and Co-Editor of a special issue on neuromarketing for the *European Journal of Marketing*. Terry completed his BA degree at Western Kentucky University, his MA at the University of Alabama, and his PhD at Michigan State University.

Dr. Jin Park

Chair, Accounting, Finance, Insurance and Risk Management, Associate Professor of Risk Management and Insurance. Scott College of Business, Indiana State University



Dr. Jin Park joined the Scott College of Business in fall 2009 and has chaired the Department of Accounting, Finance, Insurance and Risk Management since March 2019. He teaches classes on risk management, property and liability insurance, and employee benefits. His research areas of interest include asset-liability management, performance, and organizational efficiency. Dr. Park was awarded Best in Track Award three years in a row (2007 - 09) at the Academy of Finance. He earned his PhD from Temple University in Philadelphia, Pennsylvania in 2003, and served as assistant professor at Illinois Wesleyan University in Bloomington, Illinois from 2003 - 09

Agenda

Thursday, October 5, 2023

11:30 AM – 12:30 PM **CHECK IN**
Hyatt Regency McCormick, Hyatt Conference Center

12:30 PM – 12:50 PM **OPENING REMARKS**
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom
Dr. Tarek Zaher, Professor of Finance/Co-Founder and Managing Director of SMIFC, Scott College of Business, Indiana State University
Dr. Terry Daugherty, Dean, Scott College of Business, Indiana State University

Session 1

12:50 PM – 1:50 PM **PANEL DISCUSSION**
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom
Madeline Hume, CFA, *Senior Research Analyst,* Morningstar Research Services LLC
Neha Shah, CFA, *Associate Director,* Federal Reserve Bank of New York (in Chicago)
Grant Podolski, CAIA, *Client Investment Strategist,* LGIM America
Blake Shaffer, CFA, *Director, Capital Markets,* Jones Lang Lasalle

Session 2

2:15 PM – 5:00 PM **CORPORATE CONNECTION**
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom

2:15 PM – 3:15 PM **VISIT TO FEDERAL RESERVE BANK OF CHICAGO**
Transportation on your own.

2:15 PM – 3:30 PM **VISIT TO CHICAGO BOARD OPTION EXCHANGE (CBOE)**
Transportation on your own.

Session 3

4:45 PM – 6:00 PM **SMIFC TEAMS POSTER SESSION COMPETITION**
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom

4:45 PM – 5:15 PM **POSTER SESSION: JUDGES EVALUATION VISIT.**

5:15 PM – 6:00 PM **POSTER SESSION: STUDENTS VISIT.**

5:15 PM – 5:40 PM **POSTER SESSION: JUDGES MEETING**

Agenda

Session 4

5:40 PM – 6:00 PM

SMIFC PARTNERS MEETING
Hyatt Regency McCormick, irst floor,
Hyatt Conference Center, Grant Park Room

Agenda
SMIFC Journal
SMIFC Regional Meetings
Additional Sponsorships
Recommendations for Program Changes
SMIFC Database

6:00 PM – 7:30 PM

DINNER
Hyatt Regency McCormick, irst floor,
Hyatt Conference Center, Grant Park Room
Ano Glonti, MS, *Founder and CEO,* TradeUpToWallStreet LLC
Derek Horstmeyer, PhD, *Co-Founder and Director of GMU Student Managed Investment Fund; Director, Financial Planning and Wealth Management,* George Mason University

Friday, October 6, 2023

Session 5

9:00 AM – 9:50 AM

WHY TECHNICAL ANALYSIS IMPROVES THE INVESTMENT PROCESS
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom
Tyler Wood, CMT, *Managing Director,* CMT Association

9:50 AM – 10:00 AM

BREAK

Session 6

10:00 AM – 10:50 AM

BLACKROCK FOR UNIVERSITIES – EMPOWERING THE NEXT GENERATION OF INVESTMENT PROFESSIONALS
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom
Oscar D. Pulido, CFA, *Managing Director, Product Strategy for Multi-Asset Strategies & Solutions (MASS) and member of the MASS Executive Committee,* BlackRock
Hope Collins, member of the Models Infrastructure team in Multi-Asset Strategies & Solutions (MASS), BlackRock **Rodney E. Lake,** *Vice Dean for Undergraduate Programs, Director, GW Investment Institute,*
The George Washington University.

10:50 AM – 11:00 AM

BREAK

Agenda

Session 7

11:00 AM – 12:00 PM

USAGE OF CBOE'S PROPRIETARY DERIVATIVES PRODUCTS
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom
Matt Moran, *Head of Index Insights*, Cboe Options Institute
Kathy Nguyen, *Director of Product Marketing,*
Cboe Global Markets

Session 8

12:00 PM – 1:30 PM

LUNCH/ANNOUNCEMENT OF COMPETITION AWARDS
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom

Poster Session Competition Awards:
Sponsored by CMT Association.
Financial Analysis Competition Awards:
Sponsored by Indiana State University

Competition winners will be announced, and awards distributed followed by a short presentation from the winning teams.
Robert A.J. Patton, *CEO & Founder,* 548 Enterprise

Session 9

1:30 PM – 2:20 PM

TRUST ME: TRUST ADMINISTRATION IN THE 21ST CENTURY
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom
Nathan W. Beemster, *VP - Senior Regional Trust Consultant,*
Charles Schwab Trust Company of Delaware

2:20 PM – 2:30 PM

BREAK

Session 10

2:30 PM – 3:30 PM

KEYNOTE ADDRESS: IMPACT OF RECENT ECONOMIC CHANGES ON PRICES OF SECURITIES
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom
Andrew Opdyke, CFA, *Senior Economist,* First Trust

Agenda

Session 11

3:30 PM – 4:20 PM

PILLARS OF WEALTH MANAGEMENT: 13 TOPICS YOU DO NOT NEED TO BE AN EXPERT IN, BUT YOU NEED TO KNOW OF
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom
Tiffany Dolby, *Relationship Manager, Advisor Services Relationship Management,* Charles Schwab & Co

4:20 PM

CLOSING REMARKS
Hyatt Regency McCormick, first floor,
Hyatt Conference Center, Ballroom

Keynote Speaker

Andrew Opdyke, CFA

***Senior Economist,* First Trust**

Andrew is a Senior Economist and a member of the First Trust Economics Team that Bloomberg has ranked as one of the top forecasters of the U.S. economy over the past several years.

At First Trust, Andrew is responsible for analyzing economic indicators, writing economic commentaries. and producing articles on the First Trust Economics Blog. He regularly presents economic commentary to financial professionals, CFA Societies, and Financial Planning Association (FPA) chapters across the United States. Andrew also provides research and analysis to Chief Economist Brian Wesbury, Chief Market Strategist Bob Carey, and First Trust CEO Jim Bowen. Cogent's 2017 Survey of Advisors rated First Trust's thought leadership material as number one for most read and most shared by financial professionals with colleagues or clients.*

Andrew received an MBA from Northwestern University's Kellogg Graduate School of Management and a BA in Business and Economics from Hope College. He holds the Chartered Financial Analyst (CFA) designation and is a member of the CFA Institute and the CFA Society of Chicago.

*Cogent Reports conducted an online survey of a representative cross-section of 1,078 financial professionals from April through June 2017. Survey participants were required to have an active book of business of at least $5 million and offer investment advice or planning services to individual investors on a fee or transactional basis.

Speakers

Nathan W. Beemster

VP – Senior Regional Trust Consultant,
Charles Schwab Trust Company of Delaware

Nathan Beemster is a member of the Trust Company's Trust Services Consulting Team, which is responsible for all aspects of trust onboarding and review. In this role, Nathan works closely with investment advisors, estate planning professionals, and trust beneficiaries to establish new trust relationships with Charles Schwab Trust Company of Delaware.

Prior to joining Schwab in 2020, Nathan worked as a Trust Officer for ATG Trust Company in Chicago, Illinois, where he was responsible for administering the decedent's estates and irrevocable trusts. He also managed the trust department's tax preparation and IRA administration. Before that, Nathan worked as a Trust Associate for FNBC Bank and Trust in Chicago, Illinois, where he worked in all aspects of trust and estate administration.

As an attorney who has solely focused on trusts and estates throughout his law school and professional career, Nathan enjoys discussing and assisting with all areas of the practice, whether it be ordinary concerns or esoteric issues.

Hope Collins

Models Infrastructure Team Member,
***Multi-Asset Strategies & Solutions (MASS),* BlackRock**

Hope Collins is a member of the Models Infrastructure team in Multi-Asset Strategies & Solutions (MASS). Her team is responsible for the development of a scalable models operating platform and client experience underpinned by a robust governance framework. The Multi-Asset Strategies & Solutions team is the investment group at the heart of BlackRock's portfolio construction, asset allocation, and active management ecosystem. MASS draws on the full toolkit of BlackRock's index, factor, and alpha-seeking investment capabilities to deliver precise investment outcomes and cutting-edge alpha insights. MASS constructs active asset allocation strategies and whole portfolio solutions across a wide spectrum of commingled funds, separate accounts, model portfolios, and outsourcing solutions in the wealth and institutional channels.

Previously, Ms. Collins was a regional team lead of Analytics Ops (AO) in the Atlanta iHub within Data & AI. The group, founded in late 2016, develops and enhances client-agnostic quality control of risk analytics for BlackRock and BlackRock Solutions. The team relies on the principles of centralization, specialization, and data science to shape its initiatives.

Ms. Collins earned undergraduate degrees in Economics and Management and International Relations from Wells College in Aurora, New York.

Speakers

Tiffany Dolby

Relationship Manager, Advisor Services Relationship Management, **Charles Schwab & Co.**

Tiffany Dolby is a Relationship Manager within the Advisor Services organization of Schwab Institutional, where she works closely with Registered Investment Advisors. She helps owners grow their business, compete in this marketplace, and be successful among their peers.

Prior to joining Advisor Services, Tiffany worked as a Branch Manager on the North Shore of Chicago, where she was responsible for eight Financial Advisors and two Operational Staff. She was responsible for helping the advisors grow their practice, increase community awareness, and grow and maintain client relationships. Prior to that, Tiffany held various roles within the company, mainly focusing on leadership, business development, sales, and wealth management.

This is Tiffany's 15th year with Charles Schwab & Co. Her first 10 years were in the southern suburbs of Denver, Colorado. Then, in 2017, she relocated to Chicago to serve as the North Shore Branch leader and managed the Winnetka and Kenilworth branches.

Tiffany graduated from Purdue University, Krannert School of Management, located in West Lafayette, Indiana, with a degree in Economics. She holds the Series 7, 63, 66, 9, and 10 financial licenses.

As a native of San Diego, Tiffany loves the sun, outdoors, mountains, and being near or in a large body of water. Currently, she and her dog, Luna, can be found walking around Chicago looking for new restaurants and patios.

Ano Glonti, MS

Founder and CEO, **TradeUpToWallStreet LLC**

Ano Glonti has her Master's degree from Fordham University, where she majored in Global Finance with a specialization in Compliance and Risk Management. She received her Bachelor's degree in Finance & Economics from George Mason University (GMU). She was a co-president of the risk committee of Montano Student Managed Investment Fund at GMU in 2018. Ano has an extensive background in financial services, with specific interest in financial modeling, business valuation, stock market, and portfolio analysis. Ano founded TradeUpToWallStreet in 2022 with the mission to increase financial literacy among students.

Speakers

Dr. Mahmoud Haddad

***Professor of Finance,* College of Business and Public Affairs, University of Tennessee at Martin**

Mahmoud Haddad, PhD is a Professor of Finance at the College of Business and Public Affairs, University of Tennessee at Martin. Dr. Haddad has published numerous refereed financial and economic journal articles. Dr. Haddad is certified in E-Teaching and Learning, and he has broad experience in Distance and Online Teaching at both the graduate and undergraduate levels. He was the Financial and Accounting Manager at the American Family Insurance Co.; the Executive Director of Research at the Palestinian Monetary Authority; the Vice President for Administrative and Financial Affairs and Dean of the College of Business and Financial Sciences at Arab American University, and Member of the Board of Trustees and Research Fellow at the Economic Research Forum (ERF). Dr. Haddad Is Managing Director of the UT-Martin TVA Investment Challenge Program and the University of Tennessee Alumni Distinguished Service Professor.

Derek M. Horstmeyer, PhD

Co-Founder & Director of the GMU Student Managed Investment Fund, Director of Financial Planning & Wealth Management Concentration

Derek Horstmeyer, PhD, is a Professor of Finance at George Mason University's School of Business, specializing in corporate finance. His research focuses on boards, ETF and mutual fund performance, and hedge fund activism. In addition, he writes a monthly column for the *Wall Street Journal* on cutting-edge research in finance, and he has been cited in *Forbes,* Bloomberg, CNBC, *Fortune,* PBS Newshour, *NY Post, USA Today, Financial Times,* CNN, the *Washington Post,* the *LA Times,* and many other outlets. He also serves as Co-Founder of the Montano Student Managed Investment Fund and as Director of the new Financial Planning & Wealth Management major at Mason.

Madeline Hume, CFA

***Senior Research Analyst,* Morningstar Research Services LLC**

Madeline Hume is a NEXT senior research analyst for Morningstar Research Services LLC, a wholly-owned subsidiary of Morningstar, Inc. She covers new and emerging asset classes for Morningstar, including cryptocurrencies.

Before assuming her current role in 2021, Hume was a manager research analyst at Morningstar, covering multi-asset strategies.

Hume holds a Bachelor's degree in Finance from the University of Illinois Gies College of Business. She also holds the Chartered Financial Analyst® designation.

Rodney E. Lake

***Vice Dean for Undergraduate Programs; Teaching Instructor of Finance; Director,* GW Investment Institute; GW Faculty Member in Residence**

Mr. Lake serves as Vice Dean for Undergraduate Programs and Director of the GW Investment Institute. In addition to teaching courses associated with student investment funds, he manages the portfolios, connects with alumni and industry practitioners, leads the GW Investment Institute Live Show, and oversees GW Investment Institute's day-to-day operations, including staff and budget.

Mr. Lake also serves as GW Faculty Member in Residence. The program is a partnership between Academic Affairs and the Center for Student Engagement. It provides faculty members with unique opportunities to connect with students in a residential setting.

Prior to Mr. Lake's current appointment, he worked as a senior investment officer in the George Washington University Investment Office. The GW Investment Office was responsible for managing the university's then-$1.5 billion endowment fund. Before joining GW, he was a financial analyst in portfolio management at a mortgage banking subsidiary of California Federal Bank (now part of Citi).

Mr. Lake graduated cum laude from West Virginia Wesleyan College with a Bachelor of Science degree in Business Administration and went on to receive his MBA from George Washington University.

Matt Moran

***Head of Index Insights,* Cboe Global Markets**

Matt Moran is Head of Index Insights at Cboe Global Markets. In this role, Moran is focused on the exchange's educational efforts for pension funds, Registered Investment Advisors (RIAs), mutual funds, and other institutional investors. He has traveled to more than 100 cities worldwide to educate investors and deliver financial presentations. Prior to joining Cboe, Moran served as Trust Counsel at Harris Bank and Vice President at the Chicago Mercantile Exchange. He is an Associate Editor of *The Journal of Beta Investment Strategies* and has written articles for several financial publications, including *The Journal of Trading* and *The Journal of Alternative Investments*. Moran holds MBA and JD degrees from the University of Illinois at Urbana-Champaign.

Speakers

Kathy Nguyen

***Director of Product Marketing,* Cboe Global Markets**

Kathy Nguyen is Director of Product Marketing for Cboe. Based in Chicago, Kathy is responsible for helping market participants discover, adopt, and increase usage of Cboe's proprietary derivatives products through innovative marketing programs and campaigns.

Robert A.J. Patton

***CEO and Founder,* 548 Enterprise**

Robert 'A.J.' Patton is an accomplished finance, sales, and capital markets expert with more than 15 years of experience in investment banking, endowment management, real estate analysis, and development.

A.J. got his start with Duke Realty, analyzing leases and preparing valuations for the company's real estate portfolio. Then, at Equities First, a $500-million-dollar investment fund, he led the Investment and Underwriting Departments, along with managing all U.S. business development initiatives.

After Equities First, A.J. branched out on his own. He founded 548 Capital, LLC and 548 Development, LLC, to combine his expertise and track record of creating consistent returns with a personal passion for helping transform communities and their impact on the planet, and developing solutions for the housing, environmental, and economic issues facing inner cities. In 2022, A.J. combined these companies under the 548 Enterprise umbrella, creating a full-service entity that provides solutions for all aspects of the development process.

A.J. currently resides in Chicago, where he is an avid sports fan, golfer, workout enthusiast, and father. He has been named Midwest Energy "40 Under 40," American Council on Renewable Energy – Accelerate Member, Chicago Business Leadership Council Banking & Finance Co-chair, World Leaders Forum Board Member, Lowe's Green Community Partner, Chicago INVEST South/West Winner, and Chicago Community Trust Grant recipient. He holds a BS in Finance from Indiana State University.

Speakers

Grant Podolski, CFA, CAIA

***Client Investment Strategist,* LGIM America**

Grant is a Client Strategist at LGIM America, part of Legal & General Group, one of the top ten asset managers in the world by size. He is a CFA charterholder, Chartered Alternative Investment Analyst (CAIA) charterholder, and holds a Series 3 license registered with the NFA. He is involved in the CFA Society of Chicago and Out in Finance.

Grant's role and career have focused on large institutional client engagement and ensuring that custom investment solutions successfully achieve clients' long-term objectives. Alongside clients, Grant designs, implements, and ensures the success of these custom investment solutions for some of the largest asset owners in the world. He primarily focuses on investment grade fixed income and a variety of derivatives-based strategies, with a focus on liability-driven investing, exposure management, and interest rate hedging.

Grant joined LGIM America in 2020. Prior to LGIM America, Grant spent seven years in various positions at NISA Investment Advisors in St. Louis, focusing on Liability-Driven Investment portfolio management and derivatives solutions. Grant earned a BS in Business Administration, Concentrations in Finance and Accounting, from Saint Louis University in St. Louis, Missouri.

Oscar D. Pulido, CFA

***Managing Director of Product Strategy for Multi-Asset Strategies & Solutions (MASS),* BlackRock**

Oscar D. Pulido, CFA, Managing Director, is the Global Head of Product Strategy for the Multi-Asset Strategies & Solutions (MASS) group. In this role, he is responsible for commercial strategy, product development, and business activities to drive growth across the MASS platform. He is also a frequent host of The BID, BlackRock's investment podcast series.

Oscar's service with the firm dates back to 1999, including his years with Merrill Lynch Investment Managers (MLIM), which merged with BlackRock in 2006. From 2006 to 2017, Oscar served as a senior product strategist on BlackRock's Global Allocation team, responsible for representing the investment team on a global basis to both retail and institutional clients.

Oscar earned a BBA degree with a concentration in Finance and International Business from The George Washington University in 2001 and his MBA degree from New York University's Stern School of Business in 2012. He is a CFA charterholder and is fluent in Spanish.

Oscar's interests include product innovation, engaging with clients, and building diverse teams. Outside of work, he enjoys traveling, learning about different cultures, and spending time with his wife and two children.

Speakers

Blake Shaffer, CFA

***Director, Capital Markets,* Jones Lang Lasalle**

Blake is a Director in the Corporate Capital Markets practice group advising corporate clients on capital strategies to optimize their financial alternatives regarding their real estate portfolios. Blake's clientele ranges from Fortune 10 companies to lower-middle-market private equity sponsored portfolio companies. With a strong corporate finance acumen and background, Blake's expertise includes in-depth knowledge of capital structuring, financial impact analyses, and financial reporting analysis for certain real estate transactions. Blake advises clients on executing sale-leasebacks, net lease sales, lease monetization transactions, acquisition sale leasebacks, build-to-suits, and other esoteric structured financing including synthetic lease and credit tenant lease transactions. Blake's single-tenant expertise spans all major real estate asset classes including industrial, office, retail and data centers.

Prior to joining JLL, Blake worked at MB Financial Bank, a Chicago-based regional bank (now Fifth-Third Bank), as a commercial credit analyst supporting the Commercial Real Estate lending groups at the bank. Blake was responsible for gathering and analyzing due diligence, financial and quantitative analysis, and credit underwriting for $100M+ of commercial real estate loans in multiple markets in his first year.

Blake received his BBA in Finance from the Tippie College of Business, as well as a Certificate of Leadership Studies, at the University of Iowa. Blake earned his Charter from the CFA Institute in September 2019. Blake is a licensed real estate broker in the state of Illinois (Lic. No. 475.184604). Blake is a member of the CFA Society of Chicago, the CFA Society of Chicago Member Engagement Advisory Group, and the Tippie College of Business Young Alumni Mentor Program.

Neha Shah, CFA

***Associate Director,* Federal Reserve Bank of New York (in Chicago)**

Neha Shah is an Associate Director of the Mortgage Market staff within the Markets Group of the Federal Reserve Bank of New York. She is responsible for thought leadership related to mortgage markets, and for managing staff who conduct MBS market analysis and execute monetary policy operations within the agency MBS market.

Prior to starting in her current role in November 2021, over the course of 10 years with the New York Fed, Neha has held positions with the Money Markets and Treasury Markets staffs and was selected for a nine-month detail at the Department of Treasury within the Office of Capital Markets.

Neha holds a BA in Economics from New York University and an MA in International Affairs with a specialization in International Finance and Economic Policy from the School of International and Public Affairs at Columbia University. She also holds the Chartered Financial Analyst designation.

Tyler Wood, CMT

***Managing Director,* CMT Association**

Tyler Wood serves as Managing Director of CMT Association with the aim of elevating investors' mastery and skill in mitigating market risk and maximizing return in capital markets through a rigorous credentialing process, professional ethics, and continuous education. He is a seasoned business executive focused on educational technology for the financial services industry. Since 2011, Tyler has presented the tools of technical analysis around the world to investment firms, regulators, exchanges, and broker-dealers.

Tyler is a familiar voice to many as the co-host of Fill the Gap, the official podcast of the CMT Association, and as a regular guest in University classrooms through the Academic Partner Program. Tyler is also the co-founder of GoNoGo Charts, a data visualization tool that simplifies market analysis to remove emotional bias from investment decisions.

Prior to joining the CMT Association, Tyler worked in management consulting and publishing. As an executive manager over the past 20 years, he has managed product, brand communications, and sales teams to drive top-line revenue growth for public, private, and non-profit entities.

When he is not immersed in markets, Tyler is hiking the Adirondacks with his family or playing percussion for various bands along the East Coast. Tyler graduated from Macalester College and received his MBA from the Kelley School of Business at Indiana University.

Moderators

Dr. Terry Daugherty

***Dean,* Scott College of Business, Indiana State University**

Dr. Daugherty earned his BA at Western Kentucky University, his MA at the University of Alabama, and his PhD at Michigan State University.

He was a postdoctoral fellow at Vanderbilt University's Owen Graduate School of Management. After that, he went to the University of Texas at Austin as an assistant professor in the Department of Advertising. Dr. Daugherty joined the University of Akron in 2009, where he served on the faculty and in various administrative capacities, including as department chair and assistant dean.

Dr. Daugherty's scholarship is focused on examining consumer psychology and persuasion within digital marketing and advertising. He theorizes and empirically tests how individual characteristics and media properties influence cognitive processing and consumer behavior.

Dr. Jin Park

***Chairperson* – Accounting, Finance, Insurance and Risk Management (AFIRM), Scott College of Business, Indiana State University**

Dr. Jin Park joined the Scott College of Business in fall 2009 and has been chair of the Department of Accounting, Finance, Insurance and Risk Management since March 2019. He teaches classes relating to risk management, property and liability insurance, and employee benefits. His research areas of interest include asset-liability management, performance, and organizational efficiency. He was awarded the "Best in Track Award" three years in a row (2007 - 09) at the Academy of Finance. He earned his PhD from Temple Universityin Philadelphia, Pennsylvania in 2003, and served as assistant professor at Illinois Wesleyan University in Bloomington, Illinois from 2003 - 09.

Moderators

Dr. Tarek Zaher

***Professor of Finance,* Scott College of Business, Indiana State University**

Dr. Tarek Zaher has held a number of professional positions within the industry and provided consulting services to a number of international institutions, including the World Bank, the William Davidson Institute at the University of Michigan, the Academy for Educational Development in the United States, and the Ministry of Work in Dubai. He has also offered a number of seminars in investment and international financial management at institutions around the world.

Dr. Zaher is the supervisor of the Investment Club at Indiana State University. He also manages and supervises other international portfolios for individuals and institutions. Dr. Zaher's research has been published in numerous prestigious professional and scholarly journals, including the *Journal of Financial Research* and *Journal of Banking and Finance*. Dr. Zaher received three research awards and one research certificate of excellence from professional conferences. He was also recognized by the Scott College of Business with the Faculty Research Award in 2002 and with the Exemplary Service Award in 2004.

Sponsors

We would like to thank our sponsors. Without your support, this conference would not be possible.

INDIANA STATE UNIVERSITY

Indiana State University, established in 1865, is a public university that transforms the lives of students through a high-quality education infused with experiential learning, community engagement, and career-readiness. Our students succeed within a culture of inclusion and support that provides the skills and knowledge to impact Indiana and beyond.

STIFEL

Stifel is a diversified global wealth management and investment banking company focused on building relationships that help individuals, families, and organizations pursue their financial goals. The iconic image of the bull and bear shows the dedication and spirit of each member of our firm. Stifel is individually and collectively committed to using the forces of the market to benefit its clients.

THE CENTER FOR INVESTMENT RESEARCH

The Center for Investment Research is a 501(c3) founded in 1993 to support academic research in investing. The Center has funded research projects at a number of universities and currently is supporting efforts to promote student managed investment funds.

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TradeUpToWallStreet is a mobile application designed for Student Managed Investment Fund (SMIF) students to practice trading, learn more about the stock market and network with each other.

Our Goal: We strive to increase Financial Literacy among students. We enable students to be comfortable in the stock market to make intelligent trading decisions in the real world.

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Thank you!

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