

3rd Annual Investment Conference

ALL PROCEEDS benefit financial literacy education for area youth through Make A Difference – Wisconsin



Make A Difference
Wisconsin

Money Smart. Life Smart.

Wednesday, April 27, 2011

1:30 – 2:30 pm Registration | 2:30 – 5:00 pm Program | 5:00 pm Networking Reception
Pfister Hotel | 424 E. Wisconsin Avenue | Milwaukee

What is one good investment idea worth?

For the third year in a row, the Make A Difference - Wisconsin Investment Conference is certain to be a sell-out with investment professionals and investors of all experience levels. Milwaukee's own unique mix of "Wall Street Week" and the Ira Sohn Investment Research Conference in New York, a must-hear panel of investment professionals is prepared to deliver another terrific afternoon of investment idea sharing.

Don't delay! Seating is limited and this must-attend conference is expected to sell out.



Keynote speaker – William Ackman

William Ackman, CEO and portfolio manager of Pershing Square Capital Management, New York, headlines this year's conference.

Pershing Square Capital Management is a concentrated research-intensive fundamental value investor in long and occasionally short investments in the public markets. Prior to forming Pershing Square, Mr. Ackman co-founded Gotham Partners, L.P., a public and private equity investment partnership. Prior to Gotham Partners, Mr. Ackman began his career in real estate investment banking at Ackman Brothers & Singer, Inc. Mr. Ackman received an MBA from the Harvard Business School and a Bachelor of Arts *magna cum laude* from Harvard College. Mr. Ackman's board memberships include Chairman of The Howard Hughes Corporation (NYSE: HHC), J.C. Penney (NYSE: JCP), the Board of Dean's Advisors of the Harvard Business School and a number of not-for-profit boards including the Pershing Square Foundation, a charitable foundation that he launched in 2007.



Rick Lane

Founder, Broadview Advisors
Rick serves as lead portfolio manager of Broadview's FMI Focus Fund, which was named to *Forbes Magazine's* 2010 Forbes Honor Roll for delivering sound

results in markets good and bad. In 2006, Lipper recognized the Fund for its 10-year performance in the Mid-Cap Core Funds category, and in 2004 Barron's listed it among the top 100 mutual funds. In January 2002, *The Wall Street Journal* named the fund as having the best five-year track record. Rick was named "Rookie of the Year – 1997 by *Mutual Funds Magazine*, and the same year was recognized among the *Kiplinger* 30, landing him on the magazine's cover.



Daniel J. O'Keefe

**Managing Director,
Artisan Partners**

Dan is the lead portfolio manager for Artisan Global Value Fund and the firm's global value separate account portfolios, in addition

to serving as portfolio manager for Artisan's international value portfolios. The Artisan Global Value Fund received an Overall and 3-year, 5-Star Morningstar Rating™ out of a total 628 funds in the World Stock funds category, based on Morningstar risk-adjusted returns as of 12/31/10. Prior to joining Artisan, Dan was an analyst in international equities at Harris Associates. Before that, Dan was an associate in Mergers and Acquisitions at BancAmerica Securities and began his career as an analyst with Morningstar.



Kenneth S. Salmon

**Vice President, Portfolio
Manager, M&I Investment
Management Corp.**

Ken has been co-manager for the Marshall Small-Cap Growth Fund and the Marshall Mid-Cap Growth

Fund since 2004. He joined M&I in 2000 as an analyst for the Mid-Cap Growth strategy and joined the Small-Cap Growth team in 2003, and became co-manager for the two Funds in 2004. Before that, Ken was a senior analyst for Tucker, Anthony, Sutro and also for C.L. King & Associates. Ken has made several television appearances on CNBC's *Street Signs* and *The Edge*, and has been cited in numerous investment publications, including most recently, *Investor's Business Daily*. Ken's funds were named "Category Kings" by *The Wall Street Journal* in February 2010.

Register online at makeadifferencewisconsin.org \$200 by April 15 | \$250 after April 15 | \$150 CFA Society of Milw. | \$100 Make A Difference volunteers

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