

8th Annual

# Investment Conference

ALL PROCEEDS benefit financial literacy education for area youth



**Make A Difference**  
Wisconsin

Money Smart. Life Smart.

Wednesday, June 1, 2016

1:30 – 2:30 pm Registration | 2:30 – 5:00 pm Program | 5:00 pm Networking Reception  
Hyatt Regency | 333 West Kilbourn Avenue | Milwaukee

## What investment insights will inform your decisions in 2016?

Get actionable ideas and capitalize on valuable commentary from some of today's brightest investment professionals. The speaker line-up for the 8th annual Make A Difference – Wisconsin Investment Conference promises another terrific afternoon of compelling investment ideas and perspectives for you, for your investment teams...or as a unique experience for your valued clients! **Register early! We anticipate another sold-out event.**



### Byron Trott

**Founder, Chairman and CEO / BDT & Company**

Byron Trott is founder, chairman and CEO of BDT & Company. Trott and his firm are widely recognized for their work advising and investing in world-class family and founder-led companies. Based in Chicago, the firm's investment arm manages funds of more than \$8 billion. Trott has stressed the importance of teaching financial literacy to the next generation of some of the world's wealthiest families. Prior to founding BDT, Trott had a distinguished 27-year career in investment banking with Goldman Sachs.

The Investment Conference provides a rare opportunity to hear Byron Trott's perspective on investing, while supporting financial education for Wisconsin teens.



### Michael Keough

**Managing Partner & CIO  
Racon Capital**

Michael Keough is the founding principal of Racon Capital, where he oversees the investment strategies, capital allocation and corporate governance. Prior to forming Racon Capital in 2012, Keough spent 16 years trading event equity, distressed, convertible arbitrage, equity derivatives, commodities and, ultimately, global macro strategies as a principal at Stark Investments. Before joining Stark, Keough was a senior trader for Cargill Inc.



### Mariko Gordon

**Founder & Portfolio Manager  
Daruma Capital Management**

Mariko Gordon founded Daruma Capital Management 20 years ago. She is the portfolio manager for Daruma's high conviction (no more than 35 stocks) small- and mid-cap strategies. Gordon and her team use a classic, bottom-up fundamental approach to analyzing stocks, and every stock counts in the portfolio. Daruma manages \$1.6 billion on behalf of charitable organizations, public and corporate pension funds, foundations and endowments.



### David Schulz

**President, Convergence  
Investment Partners**

A CFA, David Schulz founded QIS Advisors, the predecessor firm to Mequon-based Convergence Investment Partners. Previously, Schulz was president and Chief Investment Officer of M&I Investment Management Corp., a \$17 billion investment advisor. At M&I he was instrumental in forming mutual funds, securities lending and asset allocation programs for the firm. Schulz has one patented quantitative investment process with another pending.

Register on back or at [www.makeadifferenceconference.com](http://www.makeadifferenceconference.com) \$300 by May 17 | \$350 after May 17 | \$500 at the door subject to availability | \$150 Make A Difference volunteers

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