FEFO

SPRING SEMINAR 2018

Tactical Asset Allocation in a Changing Environment

SEIDMAN | GRAND VALLEY STATE UNIVERSITY

Family Owned Business Institute

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Foundations Endowments Family Offices

Tactical Asset Allocation in a Changing Environment

Friday May 11th, 2018,

Loosemore Forum, Seidman College of Business

AGENDA

8:30AM	Registration and networking
9:00 AM	Welcoming remarks, Brian Dykstra, Managing Director, Oxford Financial Group, Ltd.
9:05AM	Jim Bianco, Founder and President, Bianco Research L.L.C. *An objective macro perspective on the forces challenging our asset allocation*
9:30 AM	Q&A
9:40 AM	Justin Blesy, PIMCO Senior Vice President and Asset Allocation Strategist, Newport Beach *Singles and doubles: Value opportunities to face market volatility*
10:05 AM	Q&A
10:20 AM	Break
10:55 AM	Brian P. Kennedy, Vice President and co-portfolio manager of multisector institutional strategies, Loomis, Sayles & Company *An unconstrained fixed income manager's approach in the current environment*
11:20 AM	Q&A
11:45 AM	Combined Speaker Panel Session: *Perspectives on tactical asset allocation models*

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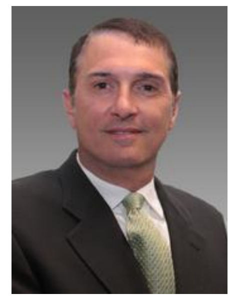
SPEAKERS

Jim Bianco, President of Bianco Research



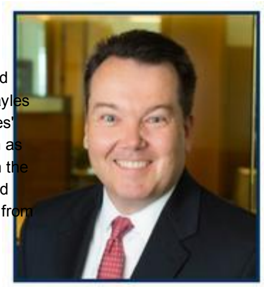
Jim Bianco is President and Micro Strategist at Bianco Research, L.L.C. Since 1990 Jim's commentaries have offered a unique perspective on the global economy and financial markets. Unencumbered by the biases of traditional Wall Street Research, Jim has built a decades long reputation for objective, incisive commentary that challenges consensus thinking. In nearly 20 years at Bianco Research, Jim's wide ranging commentaries have addressed monetary policy, the intersection of markets and politics, the role of government in the economy, fund flows and positioning in financial markets.

Jim appears regularly on CNBC, Bloomberg and Fox Business, and is often featured in the Wall Street Journal, Bloomberg News, Grants Interest Rate observer, and MarketWatch. Prior to joining Arbor and Bianco Research, Jim was a Market Strategist in quite and fixed income research at UBS Securities and Equity Technical Analyst at First Boston and Sheraton Lehman Brothers. He is a Chartered Market Technician (CMT) and a member of the Market Technicians Association (MTA). Jim has a Bachelors of Science degree in Finance from Marquette University (1984) and an MBA from Forham University (1989).

Justin Blesy, PIMCO Senior Vice President

Mr. Blesy is a senior vice president and asset allocation strategist in the New Beach office. He focuses on multi-asset strategies, customized client portfolio analysis and liquid alternatives. Prior to joining PIMCO in 2012, he was a management consultant at Oliver Wyman, where he led strategy, product development and risk management projects for financial institutions. He has 11 years of investment and financial services experience and holds an MBA from the University of Chicago Booth School of Business. He received an undergraduate degree from Dartmouth College.

Brian P. Kennedy, VP of Loomis, Sayles & Company



Brian Kennedy is a vice president of Loomis, Sayles & Company and co-portfolio manager of the firm's multi sector institutional strategies and mutual funds. Brian started his investment industry career in 1990 as a senior fund accountant at the Boston Company. He joined Loomis Sayles in 1994 as a securitized and government bond trader. He transitioned to the high yield trading desk in 2001, where he initiated Loomis Stayles' trading of bank loans, while also trading high yield, convertibles, derivatives and equities. Brian first joined the full discretion investment team as product manager in 2009. In 2013, he was promoted to co-portfolio manager of the multi-sector suite of products. Brian is actively involved in the Loomis Sayles mentorship program, undergraduate women's investment network (UWIN) and summer internship programs. He was born and raised in the south shore of Massachusetts and enjoys coaching girls club hockey. Brian earned a BS from Providence College and an MBA from Babson College.

Brian Dykstra,Managing Director of Oxford Financial Group, Ltd.

Brian Dykstra is a Managing Director with Oxford Financial Group, Ltd. Prior to making the transition to Oxford, Brian was a Vice President for Fifth Third Private Bank where he served as a Wealth management Advisor for high net worth families.

Brian has also worked in the financial service industry for more than 15 years in helping clients identify and implement investment, family gifting and business succession strategies. He also has extensive experience in providing advisory services to several nonprofit organizations.

Brian was previously with Morgan Stanley Smith Barney where he served as a Financial Advisor or individual clients in managing their assets and preserving their wealth. He also worked as the Major Gift Officer and the Director of the Hope Funds for Hope College in Holland, Michigan.

A graduate of Hope College, Brian earned a Bachelor's degree in Business Administration. He obtained the Certified Financial Planner (CFP) designation from the Certified Financial Planning Board after completing the educational curriculum at Grand Valley State University; and received the Certified Investment Management Analysis (CIMA) designation from the Investment Management Consultants Association after completing the educational curriculum at the Wharton School of Business at the University of Pennsylvania.

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