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AGENDA

8:30AM	Registration and networking
9:00 AM	Welcoming remarks, Brian Dykstra, Managing Director, Oxford Financial Group, Ltd.
9:05AM	Thomas P. Lupone, Principal & Consultant, Prime Buchholz L.L.C. *Is Winter Still Coming? Asset Allocation Wins and Losses over the Last Decade*
9:30 AM	Q&A
9:40 AM	Adam Blitz, Principal, CEO, Evanston Capital Management L.L.C. *Hedge Funds – Are they Really Worth all the Hassle?*
9:55 AM	Q&A
10:15 AM	Break
10:45 AM	Nicholas Bohnsack, Co-founder, Partner, President, Strategas Securities L.L.C. *Global Asset Allocation in a Late Cycle Slowdown*
11:10 AM	Q&A
11:20 AM	Panel Session: *Wrap up and conclusions*

FEFO

Foundations Endowments Family Offices

2019 Spring Seminar

Ten years since the 2009 investment bottom, what asset classes have worked and what asset classes have lagged.

Where are we in the investment cycle now?

Friday, May 10th, 2019
8:30 AM – 12:00 PM

Charles W. Loosemore Forum
Seidman College of Business
Grand Valley State University
50 Front Ave SW, Grand Rapids, MI 49504

SEIDMAN | GRAND VALLEY STATE UNIVERSITY

About FEFO

The Foundations Endowments and Family Offices (FEFO) is a collaboration between the Grand Valley State University, the Brooks Capital Management, The Council of Michigan Foundations, and the FEFO Steering committee members. FEFO supports family offices and foundation endowments in West Michigan by bringing together investment managers and advisors to share best practices on investing, learn about the unique challenges of managing family wealth, plan for optimal family legacy for future generations, and help develop asset management talent in the region.

FEFO Steering Committee

Patrick Gaughan	**Brooks Capital Management**
Carrie Boer	**Peter C. & Emajean Cook Foundation**
Greg Bosch	**Brooks Capital Management**
Joel Bosch	**HealthBridge Financial**
Lori Bush	**The Community Foundation of the Holland Zeeland Area**
Steve Butler	**One Quest Capital**
Brian W. Dykstra	**Oxford Financial Group, Ltd.**
Ana Gonzalez	**FOBI, GVSU**
John Kerschen	**Charter Capital Partners**
David Lindberg	**Council of Michigan Foundations**
Kelli Olson	**BDO**
Joerg Picard	**Finance Department, GVSU**
Jennifer Remondino	**Warner Norcross + Judd LLP**
Scott Spoelhof	**Bayside Capital**
Dan Van Timmeren	**Kent Community Health Foundation**
Kathleen Vogelsang	**Van Andel Institute**
Jim Wiersma	**FIRM, LLC**
Steve Zlotnicki	**Spectrum Health**

Speakers

Thomas P. Lupone, Principal & Consultant, Prime Buchholz L.L.C.

Mr. Lupone has nearly 25 years of experience in the investment industry having served various roles in capital markets, research, finance, accounting, and banking. He joined Prime Buchholz in 2006, serves as a Consultant, and advises a variety of institutional and individual clients. Mr. Lupone is currently engaged in approximately 25 client relationships representing combined assets in excess of $7 billion. At the Firm level, Mr. Lupone is involved in asset allocation, manager selection and portfolio model discussions, and is formally engaged in the manager selection process as a member of the Firm's Real Assets and Private Equity Asset Class Committees. Prior to Prime Buchholz, Mr. Lupone served in banking at Credit Suisse, research with Cambridge Associates, finance at the General Electric Company and was Co-Founder of PrivateTrade, a private equity secondaries advisory firm. He earned his Masters of Finance from Boston College and his B.B.A. from the University of Notre Dame.

Adam Blitz, Principal, CEO, CIO, Evanston Capital Management L.L.C.

Mr. Blitz is the Chief Executive Officer, Chief Investment Officer, a Principal, a member of the Investment Committee of Evanston Capital Management, LLC, and a member of its Board of Managers. He has over fifteen years of institutional investment management experience with an emphasis in quantitative analysis, trading and risk management. Prior to helping establish Evanston Capital Management, Mr. Blitz worked in the Prime Brokerage area at Goldman, Sachs & Co., where he was responsible for developing, selling, and managing funding and financing products to offer to hedge funds. He also worked closely with the risk management group within Prime Brokerage, which is responsible for determining the appropriate amount of leverage to extend to hedge funds from both a regulatory and risk-based perspective. Before joining Goldman Sachs, Mr. Blitz was the Head Trader at AQR Capital Management, a multi-strategy quantitative investment manager. Mr. Blitz also was previously employed in the Asset Management Division at Goldman Sachs, where he was a member of the Quantitative Research group. Mr. Blitz received his B.S. in Economics from the University of Pennsylvania's Wharton School. He serves as a member of the Board of Advisors of Northwestern University's School of Education and Social Policy, is a CFA charter holder, and is a member of the CFA Institute and the CFA Society of Chicago.

Speakers

Nicholas Bohnsack, Co-founder, Partner, President, COO, Head of Quantitative Research, Strategas Securities L.L.C.

Mr. Bohnsack is co-founder and partner of Strategas. He is the President and Chief Operating Officer of the Firm and heads the Firm's Institutional Securities and Institutional Solutions business groups. As an analyst, Mr. Bohnsack is head of Strategas' Quantitative Research team and directs the Firm's equity sector strategy and global asset allocation research efforts. More granularly he and his team focus on industry-level earnings and valuation forecasting and fundamental factor analysis to assist institutional investors in portfolio construction and thematic idea generation. He has been a regular guest on business news programs and has been widely quoted in the domestic and foreign press, particularly for his work on corporate profits and market valuation. Prior to co-founding Strategas, Nicholas was an Investment Strategist and Associate Managing Director with International Strategy & Investment (ISI) Group. Nicholas began his career in the Investment Banking Group at FactSet and in Restricted Securities at Morgan Stanley. Mr. Bohnsack received his MS in Mathematics from Fairfield University and received bachelor's degrees in Economics and Finance from Bryant University. He is a member of the Board of Advisors at Bryant University's College of Business.

Brian Dykstra, Managing Director of Oxford Financial Group, Ltd.(Emcee)

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 was previously with Morgan Stanley Smith Barney where he served as a Financial Advisor to individual clients in managing their assets and preserving their wealth. He also worked as the Major Gift Officer and the Director of the Hope Fund 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 Analyst (CIMA®) designation from the Investment Management Consultants Association after completing the educational curriculum at the Wharton School of Business and the University of Pennsylvania.