Presented by the Alliance for Investor Education

Funding Your Future

The 2017 Investor Boot Camp

DECEMBER 5 ▪ 1:00–4:30 P.M. ET

THE ARMY AND NAVY CLUB, 901 17TH STREET, NW, WASHINGTON, DC

EVENT SCHEDULE

1:00–1:10 p.m. **Registration, Refreshments, and Networking**

1:10–1:15 p.m. **Introductory Remarks**

Don Blandin
PRESIDENT
ALLIANCE FOR INVESTOR EDUCATION

1:15–2:10 p.m. **Panel 1: What's Next? Investing for the Long Term**

Investors will learn about the process of investing, vehicles for investing, and basic strategies for planning for their financial future, including setting goals, assessing risks, and understanding investment products. Panelists will touch on planning and investing at key life stages and for all populations, including military servicemembers and their families.

Don Blandin, MODERATOR
PRESIDENT AND CEO
INVESTOR PROTECTION TRUST
PRESIDENT
ALLIANCE FOR INVESTOR EDUCATION

Kerry Hannon
AUTHOR AND COLUMNIST FOR THE *NEW YORK TIMES*, *FORBES*, AND AARP

Christina Kilroy
VICE PRESIDENT
ICI EDUCATION FOUNDATION

Randy Nordby
MEMBER, BOARD OF DIRECTORS
CFA SOCIETY

2:10–2:20 p.m. **Break**

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2:20–3:15 p.m. **Panel 2: What's Next? Managing Investing Risks and Rewards**

Investors will learn about various types of behaviors that can pose risks to their investments, including reaching for yield, attempting to time the market, and over- and under-managing investments. The panelists will talk about each type of behavior and provide strategies for recognizing and avoiding them.

Jason Doss, MODERATOR
PRESIDENT
PIABA FOUNDATION

Robert Stammers
DIRECTOR OF INVESTOR ENGAGEMENT
CFA INSTITUTE

Pete Chandler
DIRECTOR OF INVESTOR EDUCATION
FINANCIAL INDUSTRY REGULATORY AUTHORITY (FINRA)

Wayne Thorp
VICE PRESIDENT AND SENIOR FINANCIAL ANALYST
AMERICAN ASSOCIATION OF INDIVIDUAL INVESTORS (AAII)

3:15–3:25 p.m. **Break**

3:25–4:15 p.m. **Panel 3: What's Next? Making Wise Investing Decisions (and Getting Help When You Need It)**

In this session, investors will learn how to do their due diligence about investment products and financial professionals, strategies for choosing a financial professional, and steps to take to check out advisors and investments before investing. Investors will hear how to spot the red flags of financial fraud, as well as what to do if they or a loved one is a victim.

Robert Stammers, MODERATOR
DIRECTOR OF INVESTOR ENGAGEMENT
CFA INSTITUTE

Jason Doss
PRESIDENT
PIABA FOUNDATION

Alan Sorcher
ASSISTANT DIRECTOR
OFFICE OF INVESTOR EDUCATION AND ADVOCACY
US SECURITIES AND EXCHANGE COMMISSION

Linda Sherry
DIRECTOR, NATIONAL PRIORITIES
CONSUMER ACTION

Anna Ratner
COUNSEL, PUBLIC POLICY
CFP BOARD OF STANDARDS

4:15–4:30 p.m. **Concluding Remarks**

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