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The Peter J. Tobin College of Business-2nd Annual Investment Management Conference

By: Jennifer Vacchio
Queens Campus -

On Friday, March 31, 2006, roughly 150 students, faculty and administrators gathered at the Manhattan campus for the 2nd Annual Investment Management Conference.

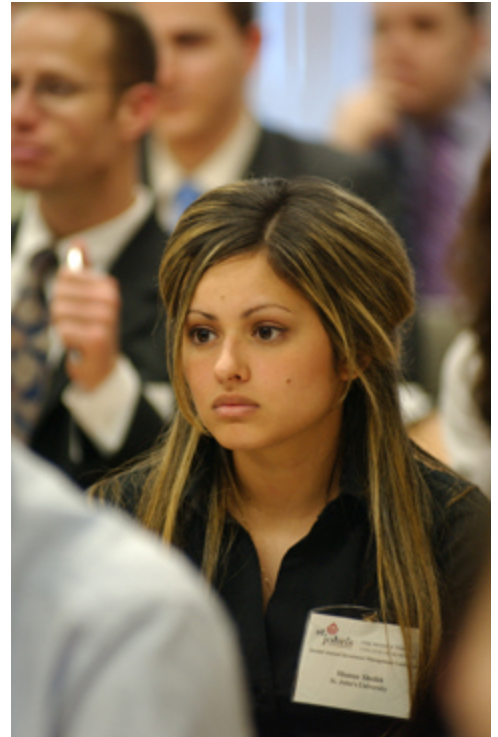
Kicking off a full day of speakers and breakout sessions was Robert Hill of Ameriprise along with Bruce Ross of H.D. Vest Financial Services, Bob Ince of Tribeca and Hal Geller of NASD. The four speakers introduced and described a range of professional certifications and related career paths for students. Bob Hill and Bruce Ross focused on financial advising and planning and referenced the CFA, CFP, and ChFC. Hal Geller concentrated on securities licenses, in particular, what they enable individuals to do that makes them attractive hires or helps advance their careers.

In the second session entitled, Portfolio Management and Construction, Jeffrey Heisler, Senior Analyst at Gottex Fund Management of Boston, talked about the fund of funds structure in the hedge fund area. Since hedge funds are lightly regulated and information about them more difficult to get for investors, a fund of funds structure adds value by picking different hedge funds to be combined in a portfolio. His talk introduced the structure and discussed its evolution and future challenges.

Jonathan Shelon, Global Asset Allocation Portfolio Manager for Fidelity Management and Research, was a session speaker and the deliverer of the keynote address. His portfolio structure talk focused on age-based portfolios and the challenge of constructing them to meet retirement objectives given the critical nature of the objective and investors' tendencies to invest sub-optimally on their own.

After a lunch break, Richard A. Highfield, Dean of The Peter J. Tobin College of Business announced the winners of a nationwide essay competition. Cash awards and certificates were presented to first place winner Adam Rubin of Michigan, second place winner Phillip Monin of Canisius and Daniel McGirr of NYU, who claimed the third place spot. St. John's student Nataliya Taleva also received Honorable Mention acknowledgement for her essay submission.

The afternoon portion of the conference included two breakout sessions, one of which was entitled, "Current Trends in Commodities Markets/Trading," led by Joseph O'Neill, Senior VP of Market Development at the New York Board of Trade; and Gregory Cotter, President and Head Trader of TriGlobal FX. The second session, "Uses of Financial Labs/Trading Rooms on College Campuses," was



led by Patrick Gregory, a faculty member at Bentley College and the Managing Director of Bentley's on-campus financial lab.

Four presenters from NYSSA, the largest analyst society in the world, led four break-out sessions in the late afternoon session. Eric Stieglitz, of the Career Advocacy Group, introduced himself and his three colleagues and announced that NYSSA is very active in educating both investment professionals and students. Hamilton Lin, Wall Street Training, described the investment banking career path and its pros and cons, as John Eade of Argus Research Corp. talked about how independent research provides an important function for the markets.

Kedrick brown focused on trading careers in a separate break out session and emphasized their very fast pace, and the importance of discipline.

Students were invited to a closing reception in the atrium of the Manhattan campus.

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THE PETER J. TOBIN
COLLEGE OF BUSINESS

**2nd Annual Investment
Management Conference**
March 31st 9:00 am—6:45 pm
Manhattan Campus

SCHEDULE

*A special thanks to
Ameriprise Financial
for its corporate sponsorship.*

9:00 AM—12:00 PM Registration/Check-in

9:00 AM—10:00 AM Continental Breakfast—2nd Floor Lobby

10:00 AM—11:05 AM Employers and Professional Certification—2nd Floor Auditorium

- *Financial Planning and the CFP: Bob Hill (Ameriprise Financial)*
- *CFP, ChFC, CLU, CFA: Bruce Ross (consultant for Chase Learning & Dev., NY Institute of Finance)*
- *Securities Licenses: Hal Geller (NASD)*

11:15 AM—12:20 AM A: Nationwide Undergraduate Investment Research Essay Competition – Room 123

- *Presentation and judging of contest submissions by the 3 Finalists*

11:15 AM—12:20 AM B: Portfolio Management & Construction—Auditorium

- *Fund of Funds—Past, Present, Future: Jeffrey Heisler (Gottex Fund Management)*
- *Design and Construction of the Fidelity Freedom Funds: Jonathan Shelon (Fidelity Investments)*

12:30 PM—1:15 PM Lunch— Cafeteria

1:15 PM — 2:15 PM Keynote Speaker, Announcement of Essay Competition Winners—Auditorium

- *Recognition of Essay Competition Winners: Dean Richard A. Highfield*
- *Keynote Address: Jonathan Shelon, Global Asset Allocation Portfolio Manager, Fidelity Management and Research*

2:20 PM—3:30 PM A: Current Trends in Commodities Markets/Trading—Room 123

- *Perspectives from the Commodities Exchange: Joseph O'Neill (SVP, Marketing, New York Board of Trade)*
- *Foreign Exchange Markets and Trading: Gregory Cotter (TriGlobal FX)*

2:20 PM—3:30 PM B: Uses of Financial Labs/Trading Rooms on College Campuses—Auditorium

- *Faculty and students from Bentley College's Hughey Center for Financial Services*

3:30 PM—3:40 PM Coffee Break

3:45 PM—5:30 PM NYSSA Career Program—Auditorium, Rooms 208 & 215

- *Eric Stieglitz (NYSSA), Hamilton Lin (Wall St. Training), John M. Eade (Argus Research), Kedrick Brown*

5:35 PM—5:45 PM Concluding Remarks: St. John's Faculty/Administration—Room 123

5:45 PM—6:45 PM Reception/Students Networking Opportunity—Room 123

Information/Employer Tables:

AFLAC	Ameriprise	AXA Financial
Becker Professional Review	CNA Insurance	First Investors
Goldman Sachs	HSBC	JP Morgan Chase
KForce	Lehman Brothers	Morgan Stanley
Northwest Mutual Financial	Restoration Capital Management	State Street
Sterling Equities	U.S. Comptroller of the Currency	Wall Street Services
Wells Fargo		