2016 Annual Investment Forum

Navigating Global Divergent Markets | Featured Speakers

Howard Marks, CFA, CIC
Co-Chairman
Oaktree Capital

Since the formation of Oaktree in 1995, Mr. Marks has been responsible for ensuring the firm's adherence to its core investment philosophy; communicating closely with clients concerning products and strategies; and contributing his experience to big-picture decisions relating to investments and corporate direction. From 1985 until 1995, Mr. Marks led the groups at The TCW Group, Inc. that were responsible for investments in distressed debt, high yield bonds, and convertible securities. He was also Chief Investment Officer for Domestic Fixed Income at TCW. Previously, Mr. Marks was with Citicorp Investment Management for 16 years, where from 1978 to 1985 he was Vice President and senior portfolio manager in charge of convertible and high yield securities. Between 1969 and 1978, he was an equity research analyst and, subsequently, Citicorp's Director of Research. Mr. Marks holds a B.S.Ec. degree cum laude from the Wharton School of the University of Pennsylvania with a major in finance and an M.B.A. in accounting and marketing from the Booth School of Business of the University of Chicago, where he received the George Hay Brown Prize. He is a CFA® charterholder and a Chartered Investment Counselor. Mr. Marks is a member of the Investment Committees of the Metropolitan Museum of Art and the Edmund J. Safra Foundation; a Trustee of the Metropolitan Museum and Mount Sinai Hospital; Chairman of the Board of Trustees of the Royal Drawing School; and an Emeritus Trustee of the University of Pennsylvania (where from 2000 to 2010 he the chaired Investment Board).

Greg Valliere
Chief Political Strategist
Horizon Investments

Greg Valliere is the Chief Political Strategist at Horizon Investments, the fast-growing Charlotte firm that specializes in products that mitigate investor risk. Greg has nearly 40 years of experience following Washington issues for institutional and retail investors. He also is widely quoted in the nation's media. Greg specializes in coverage of the Federal Reserve, tax and spending issues, and – of course – politics. Greg has held many positions during his career, including Director of Research at the Charles Schwab Washington Research Group. Before joining Horizon, he was the Chief Political Strategist at the Potomac Research Group for the past six years. He is a regular guest on CNBC, Bloomberg TV and radio, Fox Business, CNN, and CBS radio. He is also regularly quoted in the nation's financial press, including Barrons and the Wall Street Journal. A 1974 graduate of George Washington University, Greg and his wife Mary live in downtown DC, at the Watergate.

Jeffrey E. Gundlach
CEO & CIO
DoubleLine Capital

Mr. Gundlach is the Chief Executive Officer and Chief Investment Officer of DoubleLine. He is recognized as an expert[1] in bond and fixed income investments. His investment strategies have been featured in leading publications including The New York Times, The Financial Times, The Wall Street Journal, USA Today, Barron's, Forbes, and Fortune. In 2010, Mr. Gundlach was named to the SmartMoney Power 30. In 2011, he was featured as "The King of Bonds" in Barron's, and named one of "5 Mutual Fund All-Stars" by Fortune Magazine. In 2012 and 2015, he was named one of the "50 Most Influential" by Bloomberg Markets magazine. In 2013, he was named "Money Manager of the Year" by Institutional Investor. He is a graduate of Dartmouth College summa cum laude holding a BA in Mathematics and Philosophy. He attended Yale University as a PhD candidate in Mathematics.

Brian D. Singer, CFA, Partner
Head of Dynamic Allocation Strategies
William Blair & Company

Brian Singer is the head of the Dynamic Allocation Strategies team and also serves as a portfolio manager. Before joining William Blair in 2011, he was the head of investment strategies at Singer Partners, LLC. Previously, Brian was the head of global investment solutions and the Americas chief investment officer for UBS Global Asset Management, where he was a member of the UBS Group managing board and global asset management executive committee. Brian formerly served as a board member and chair of the CFA Institute board of governors. He is a member of the CFA Society of Chicago and a member of the CFA Institute Research Foundation Board of Regents. He serves on the endowment investment committee for Exeter College at Oxford University and is the chairman of the "Free to Choose Network," which is inspired by the ideas of economist Milton Friedman. Brian also serves as a member of the Rehabilitation Institute of Chicago Foundation's board. Brian has written extensively on global portfolio, currency, and performance issues and co-wrote the seminal *Determinants of Portfolio Performance II: An Update* with Gary Brinson and Gilbert Beebower. In 2009 Brian was the lead author of *Investment Leadership and Portfolio Management*, Wiley Publishing. Education: B.A., economics, Northwestern University; M.B.A., University of Chicago's Booth School of Business.

1. Money News on May 26, 2011: Headline of the story: Bond Expert Gundlach: Housing Collapse to Spark Second Financial Meltdown. Morningstar on January 5, 2012: "….Jeffrey Gundlach, a high-profile fixed-income expert …"