

Day 1 Morning - Tuesday, October 27
YOUR PORTFOLIO: MACRO BACKDROP

9:30 AM Welcome	Wes Moore Robin Hood
9:35 AM Election 2020: Predictions	Charles E. Cook, Jr. The Cook Political Report <i>Interviewer:</i> Dana Perino Anchor of The Daily Briefing / Co-Host of The Five / Fmr White House Press Secretary
10:00 AM Looking Ahead	Part 1: Jared Bernstein Center on Budget and Policy Priorities Part 2: Larry Kudlow The White House <i>Moderator:</i> Alan Schwartz Guggenheim Partners
10:30 AM Investor View	Greg Coffey Kirkoswald Asset Management LLC <i>Interviewer:</i> Tony Pasquarello Goldman Sachs
11:00 AM Break	
11:10 AM Monetary and Fiscal Policy Implications	Kenneth S. Rogoff Harvard University Jeremy Stein Harvard University <i>Moderator:</i> Zanny Minton Beddoes The Economist
11:40 AM Five Things that will Define the Post-Pandemic World Economy	Dambisa Moyo Mildstorm Group
12:00 PM Fireside Chat	Stanley F. Druckenmiller Duquesne Family Office LLC Paul Tudor Jones II Tudor Investment Corporation
12:30 PM Morning Session Ends	

BONUS: LUNCH HOUR LIGHTNING ROUND!

1:00 PM Lightning Round, NextGen Pitches	Joyce Meng Fact Capital Cliff Sosin CAS Investment Partners Fernando Vigil Teca Partners, LP <i>Moderator:</i> Kim Y. Lew Columbia Investment Management Company
--	---

Day 1 Afternoon - Tuesday, October 27

YOUR PORTFOLIO: INVESTABLE IDEAS

2:30 PM Welcome Back for a Best Idea Blitz	Mary Callahan Erdoes JPMorganChase & Co.
Best Idea	Anthony Bozza Lakewood Capital Management
Best Idea	Mala Gaonkar Lone Pine Capital
Best Idea	Boaz Weinstein Saba Capital
Best Idea	Vivian Lau One Tusk Investment Partners
Best Idea	Scott Ferguson Sagem Head Capital Management
Best Idea	Larry Robbins Glenview Capital Management
3:50 PM Break	
4:00 PM Private Equity Titans Talk	Jon Gray Blackstone <i>Interviewer:</i> Barry S. Sternlicht Starwood Capital Group
4:30 PM Exploring Growth vs. Value	Cliff Asness AQR Capital Management David Einhorn Greenlight Capital, Inc. <i>Moderator:</i> Lee S. Ainslie III Maverick Capital
5:00 PM Fireside Chat	Ken Griffin Citadel Paul Tudor Jones II Tudor Investment Corporation
5:30 PM Conference Day 1 Ends	

Day 2 Morning - Wednesday, October 28

THE FUTURE: THE WORLD AFTER COVID

8:30 AM Welcome Back	Wes Moore Robin Hood
8:35 AM How We Will End the COVID-19 Pandemic	Scott Gottlieb, MD American Enterprise Institute / Former Commissioner, US Food & Drug Administration Michael Pellini, MD Section 32 Dave Ricks Eli Lilly and Company <i>Moderator:</i> Joel S. Marcus Alexandria Real Estate Equities, Inc. / Alexandria Venture Investments
9:10 AM Rethink the Future: <i>The End of the Industrial Order and the Coming Age of Freedom</i>	Tony Seba Clean Disruption / RethinkX
9:40 AM Break	
9:50 AM Future of New York City	Jeff T. Blau Related Companies Richard LeFrak LeFrak Anthony Malkin Empire State Realty Trust <i>Moderator:</i> Barry S. Sternlicht Starwood Capital Group
10:25 AM Rise of the Retail Investor	Kelli Keough JPMorgan Chase & Co. Joseph Mecane Citadel Securities Liz Ann Sonders Charles Schwab & Co., Inc. <i>Moderator:</i> Jim Cramer CNBC
11:00 AM What's Ahead for Tech?	Marcelo Claude SoftBank Group International / SoftBank Group Corp. <i>Interviewer:</i> Barry S. Sternlicht Starwood Capital Group
11:30 AM Morning Session Ends	

Day 2 Afternoon - Wednesday, October 28

THE FUTURE: NAVIGATING SYSTEMIC CHANGE

2:30 PM Welcome Back	
2:35 PM Deglobalization or Reglobalization? <i>The Future of US-China Relations</i>	Tony Blinken Former Deputy Secretary of State Henry M. Paulson, Jr. Paulson Institute <i>Moderator:</i> David M. Solomon Goldman Sachs
3:05 PM Partisanship and US Institutions	Kelly Ayotte Former U.S. Senator New Hampshire Neal Katyal Hogan Lovells Norman Ornstein American Enterprise Institute <i>Moderator:</i> David McCormick Bridgewater Associates
3:45 PM Climate Change	David S. Vogel Volordige Investment Management Jules Kortenhorst Rocky Mountain Institute
4:25 PM Break	
4:35 PM The Future of Capitalism	Melody Hobson Ariel Investments Howard Schultz Starbucks <i>Moderator:</i> Poppy Harlow CNN Anchor / Host of "Boss Files with Poppy Harlow"
5:05 PM Wall Street's Future	Raymond J. McGuire Formerly of Citi <i>Interviewer:</i> Mary Callahan Erdoes JPMorgan Chase & Co.
5:30 PM Fireside Chat: The Long View	Ken Langone The Home Depot <i>Interviewer:</i> Paul Tudor Jones II Tudor Investment Management
5:40 PM End Conference	